

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

Name of Activity	
Date(s)	Activity Date: Expiration Date (for enduring materials):
Target Audience	
What is the activity type (choose 1)?	<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].
Brief Description (include why a learner should attend this session)	
Location (if applicable)	
List Planning Committee Members	
List Faculty/Authors (All faculty and authors must disclose COI information)	
Requirement 1: <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>	
What is the problem we want to address? (What is being done now that needs improvement? Where are the practice gaps—the difference between actual and ideal patient outcomes?)	
Why does the problem exist? (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:
Provide some resources that	<u>Peer-reviewed literature:</u> <input type="checkbox"/> SLEEP

<p>demonstrate how the problem or practice gap and educational needs were identified. (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><u>Guidelines or standards:</u> <input type="checkbox"/> AASM guidelines <input type="checkbox"/> Other guidelines <input type="checkbox"/> AASM Accreditation standards <input type="checkbox"/> Other standards</p> <p><u>Expert needs:</u> <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><u>Participant needs:</u> <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><u>Observed needs:</u> <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><u>Environment:</u> <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><u>Other:</u> _____</p> <p>List attachments:</p>
<p>Requirement 2: <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>Learning Objectives</p>	<p>“Upon completion of this activity, participants should be able to...”</p>
<p>Activity Designed to Change (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>Requirement 3: <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>Provide questions that can be used to measure outcomes for activity.</p>	
<p>Requirement 4: <i>the provider develops activities/educational interventions in the context of desirable physician attributes (e.g. IOM Competencies, ACGME Competencies)</i></p>	
<p>Which competency does the activity develop? (check all applicable)</p>	<p><input type="checkbox"/> Patient care: Provide care that is compassionate, appropriate and effective treatment for health problems and to promote health.</p> <p><input type="checkbox"/> Medical knowledge: Demonstrate knowledge about established and evolving biomedical, clinical and cognate sciences and their application in patient care.</p> <p><input type="checkbox"/> Interpersonal and communication skills: 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"/> Professionalism: Demonstrate a commitment to carrying out professional responsibilities, adherence to ethical principles and sensitivity to diverse patient populations.</p> <p><input type="checkbox"/> Practice-based learning and improvement: 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"/> Provide patient-centered care – 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"/> Work in interdisciplinary teams – cooperate, collaborate, communicate, and integrate care in teams to ensure that care is continuous and reliable</p> <p><input type="checkbox"/> Employ evidence-based practice -- 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"/> Apply quality improvement – 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"/> Utilize informatics – communicate, manage, knowledge, mitigate error, and support decision making using information technology</p>
<p>Requirement 5: <i>The provider chooses educational formats for activities that are appropriate for the setting, objectives and desired results of the activity</i></p>	

What educational format(s) best support(s) the objective(s) of the activity?	<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)
Describe how the educational format supports the objective(s) of the activity?	
How many <i>AMA PRA Category 1 Credits™</i> should be offered for this activity?	
Date Planning Completed	
List attached planning minutes or additional planning documents?	List attachment:

Commercial Support

Did anything change in the activity from the planning document?	<input type="checkbox"/> No <input type="checkbox"/> Yes If yes, please explain:
Did this activity receive commercial support? Please click here for the ACCME definition of commercial support.	<input type="checkbox"/> No <input type="checkbox"/> Yes
Please list the name of the commercial supporter(s):	
If the activity received commercial support, was it monetary or in-kind?	<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:
If the activity received commercial support, are any commercial support agreements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA List attachment:

attached and dually signed by both parties?	
If the activity received commercial support, is the income-expense statement attached?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> NA List attachment:
Attachments for Activity File Documentation 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