

For office use only:

Direct Sponsorship
Joint Providership

# **CME Application and Planning Worksheet**

# **General Information**

The CME planning process is based on criteria of the Accreditation Council for Continuing Medical Education (ACCME) and sound adult learning principles. The MORE Foundation CE Committee has the responsibility for assuring that CME activities meet these requirements. This application is an essential step that will guide you through the planning process. Each section references a letter/number (e.g., C5) which refers to the relevant ACCME Criterion. For more information on the ACCME criteria, refer to the <u>ACCME Essential Areas and their Elements</u>.

Except where noted, all sections must be completed. Email the completed document and attachments to: info@more-foundation.org

Act	ivity Information					
Dat	Date Submitted: Activity Contact (name, email and phone):					
Pro	Proposed Activity Title:					
Dep	partment/Organization	1:		Antic	ipated Number of Atte	endees:
Spe	aker (s):				noraria 🗌 No 🔄 Yes ount	
Pro	posed Activity Date(s	):	Time (if live event):		Location (if live event)	:
Pro	posed Activity Ty	pe (Select all that apply by placin	ng an X in the appropri	iate box	<)	C5
		se, Symposium, Workshop, Conf				
	Regularly Schedul	ed Series (RSS) (Grand Rounds	, Tumor Board, Case (	Confere	ence, Journal Club, M&	M, etc.)
		eek 🗌 2/Week 🗌 2/Month				
	Enduring Material	(Provide a copy or link of the e	nduring material as p	part of	the CME/CE Review)	
	CD-ROM	ternet Archive / On Demand	] Monograph 🛛 Nev	wsletter	Other:	
	How long are you se	eeking CME approval for this end	uring material?	(up to	3 years)	
	Performance Impro	ovement CME		• •	•	
	Other					
Cr	Credit Type: How many credit hours are requested?					
	American Medical Association AMA PRA Category 1 Credits™					
	Other (e.g. PT, nursing, AT)					
	Are you seeking Maintenance of Certification (MOC)/Continuing Certification (CC)?       Image: No image: Seeking Maintenance of Certification					
	Anesthesiology (ABA) Internal Medicine (ABIM) Ophthalmology (ABO)					
	Otolaryngology, Head, & Neck (ABOHNS) Pathology (ABPath) Pediatrics (ABP)					

# Leadership and Administrative Staff Support

<b>Activity Medical Director/Moderator</b> The physician or basic scientist who has overall responsibility for planning, developing, implementing, and evaluating the content and logistics of a certified activity.							
Name Degree(s)							
Title	Affiliat	Affiliation			Department		
Address City			;	State	ZIP		
Phone Fax						Email	

DISCLOSURE Statement for this activity submitted

<b>Activity Co-Director (optional)</b> The individual who shares responsibility for planning the certified activity. Designating an Activity Co-Director is optional, but strongly encouraged, for a jointly sponsored or co-sponsored activity.						
Name Degree(s)						
Title	Affiliation	Affiliation		Department		
Address		City		State		ZIP
Phone Fax				Email		

DISCLOSURE Statement for this activity submitted

Administrative Coordinator/CME Associate The individual responsible for the operational and administrative support of the certified activity; this is usually an administrative or staff assistant.					
Name Degree(s)					
Title	Affiliation		Department		
Address City		City		State	ZIP
Phone Fax			Em	ail	

## DISCLOSURE Statement for this activity submitted

degrees, titl	Planning Committee <u>In addition to the activity medical director, co-director, and/or CME Associate</u> , list the names, degrees, titles, affiliations and emails of persons chiefly responsible for the design and implementation of this activity. <b>Use</b> additional sheets if necessary. Note, all individuals listed will be required to complete a CME disclosure.				
Name	Debra Sietse	Debra Sietsema			MSN, PhD
Title	Director	Affiliation	MORE Foundation	Email	debra.sietsema@more- foundation.org
Name	Marc Jacofsk	Ŋ		Degree(s)	PhD
Title	Executive Director	Affiliation	MORE Foundation	Email	marc.jacofsky@more- foundation.org
Name	Vickie Icenog	Vickie Icenogle			
Title	Business Manager	Affiliation	MORE Foundation	Email	victoria.icenogle@more- foundation.org
Name				Degree(s)	
Title		Affiliation		Email	

Name		Degree(s)	
Title	Affiliation	Email	
Name		Degree(s)	
Title	Affiliation	Email	

DISCLOSURE Statements for this activity submitted

# **Planning Process**

The CME planning process is based on a foundation of needs assessment which serves to identify professional practice gaps of the intended audience, articulate the needs, and outline the objectives and expectations necessary to design learning activities that will change competence, performance, and/or patient outcomes.

<b>Identify Practice Gaps</b> The practice gap is the difference between what actually occurs and what ideal or evidence-based practice should be. Define what the problem or needs might be based on what actually occurs versus what the ideal practice should be. Explain WHY this education is needed. (approximately < 100 words)	C2, C3, C5

Needs Assessment Data and Source		C2	
What sources did you use to identify the professional gaps? (Select all that apply) Provide data source and			
accompanying explanation as evidence for how profe			
providers are not knowledgeable or skilled in the cont			
documentation, if needed, and/or narrative summary f			
New methods of diagnosis or treatment (knowledge)	External requirements such as: National Commit	tee for	
Availability of new medication(s) or indications(s)	Quality Assurance (NCQA), Joint Commission on		
(knowledge)	Accreditation of Healthcare (JCAHO) or Health Plar		
Development of new technology (knowledge)	Employer Data and Information Set (HEDIS). (Com	petence	
Input from experts regarding advances in medical	and Performance)		
knowledge (knowledge)	Continuing review of changes in quality of care as		
Literature review (knowledge)	revealed by Quality Department, medical audit or othe	er patient	
Data from outside sources, e.g., public health statistics	care reviews (Competence and Performance)		
(knowledge)	Referral patterns (Competence and Performance)		
Survey of target audience (knowledge)	Legislative, regulatory or organizational changes	i	
Quality assurance/audit data (Competence &	effecting patient care (Knowledge, Competence ar	nd	
Performance)	Performance)		
Professional society requirements (Competence &	Joint Commission Patient Safety		
Performance)	Goal/Competency:		
	Other:		

## Identify Evidence Based Support

Provide 1-3 references from the professional literature that provide evidence-based support for the education that will be presented.

C2

State the educational Select only the type of the type	Identify Educational NeedsC2, C3,State the educational need(s) that were determined to be the cause of the professional practice gap(s).C5Select only the type of need(s) that apply to this learning activity. Teaching and evaluation methods should correspond to the educational need. (approximately < 50 words each)C1, C3,				
Type of Need	Educational Need				
Knowledge need(s)					
Competence need(s)					
Performance need(s)					

<b>Objectives and Expected Results</b> Select the key identified educational needs listed above the and list specific, measurable learning objective(s), the char (You may combine needs if appropriate or add rows as new	nge type, and what		C2, C3, C4, C5, C6, C10, C11
Learning Objective	Change Type	Designed to Change	9
	Competence Performance Patient Outcomes		
	Competence Performance Patient Outcomes		
	Competence Performance Patient Outcomes		

Sele	<b>How does this activity align with the mission of CME?</b> Select all that apply by placing an X in the appropriate box. (It may be best to complete this after you have				
COII	completed the planning process. Evaluation methods should correspond to activity intent.)				
	Designed to produce changes in physicians resulting in improved knowledge and competence				
	Designed to produce changes in physicians resulting in improved performance				
	Designed to produce changes in physician practice resulting in improved patient outcomes				

	e activity you have in r	ent, please select all that apply – at least one from mind is related to what learners actually do in their
Audience:	Geographic Locations:	Specialty:
<ul> <li>Primary Care Physicians</li> <li>Specialty Physicians</li> <li>Pharmacists</li> <li>Physician Assistants</li> <li>Nurse Practitioners</li> <li>Physical/Occupational</li> <li>Therapists</li> <li>Social Worker</li> <li>Residents and Fellows</li> <li>Registered Nurses</li> <li>Respiratory Therapists</li> <li>Students</li> <li>Other: (specify)</li> </ul>	Local/Regional National International	Anesthesiology       Pediatrics         Emergency       Psychiatry         Medicine       Radiology         Family Medicine       Surgical Specialties:         Internal Medicine       Surgical Specialties:         Neurology       Other:         Orthopedics       (specify)         Pain Specialty       Other:
How will the content of the activ	vity be made relevan	It to the learners' current and potential scope of practice?

<b>Design Format</b> The format for the activity should be based on adult learning principles. (Select all that apply by placing an X		C5
in the appropriate box) Format		
Lecture – interactive with Q&A     Panel Discussion     Case Presentation     Case discussion with Audience Interaction     Small Group Discussion     Problem-Solving     Laboratory Activity     Simulation     Demonstration     Brainstorming     Other (Describe):	Explain why this educational format is appropriate for this activity.	

Desirable Physician Attributes/Core Competencies (select all that apply, at least 1)		C6
CME activities should be developed in the context of desirable physician attributes. Place an X next to all		
American Board of Medical Specialties (ABMS)/Accreditation Council for Graduate Medical Education		
(ACGME), Association of American Medical Colleges (AAMC) or Interprofessional Education Collaborative		
competencies that will be addressed in this activity.		
Patient care/patient-centered care and procedural	Apply quality improvement	
skills	Utilize informatics	
Medical knowledge	Employ evidence-based practice	
Practice-based learning and improvement	□ Values/Ethics for interprofessional practice	
Interpersonal and communication skills	Roles/responsibilities	
Professionalism	Teams and teamwork	
System-based practice	Interprofessional communication	
Work in interdisciplinary teams	Other (Describe):	

Faculty Selection (Select all that apply by placing an X in the appropriate box)	C7
Who will identify the presenter(s) and topic?	
Activity Chair/Moderator CME/CE Committee Other:	
What criteria will be used in the selection of the presenters?	
Subject matter expertise Excellence in teaching skills Effective communication skills	
Previous experience as a CME presenter 🔲 Other:	

<b>Faculty Disclosure</b> (Select all that apply by placing an X in the appropriate box) Each faculty must complete a faculty disclosure form. What methods(s) of faculty disclosure do you intend to use? All selected methods must be demonstrated on activity materials.	C7
<ul> <li>will include on presentation</li> <li>will put on printed materials</li> <li>will announce at start of activity</li> <li>Other: (specify)</li> </ul>	

Evaluation and Outcomes		
How will this activity be evaluated for its effectiveness?		C11
previously (i.e., changes in competence, performance, or patient health outcomes) which methods will be		
used? Select all appropriate methods of evaluation and		
	AND COMPETENCE	
Can learners ap	oply what was learned?	
Post activity questionnaire (minimum required)	Physician and/or patient surveys	
Audience response system (ARS)		
Customized pre and post-test		
	FORMANCE	
	emented what was learned?	
This may be obtained from actual data or fr	om post activity self-assessment by the attendees.	
Adherence to guidelines (as determined by a	Chart audits for physician behavioral change	
survey)		
Case-based studies	Direct observations	
Customized follow-up survey/interview/focus group	Other, specify:	
about actual change in practice at specified intervals		
	y learned in a way that improves outcomes? om post activity self-assessment by the attendees.	
This may be obtained from actual data of the	on post activity sen-assessment by the attendees.	
Observe changes in health status measure	Obtain patient feedback and surveys	
Observe changes in quality/cost of care	Other, specify:	
Measure mortality and morbidity rates		
Will MORE Foundation provide a web-based evaluati	on, raw data, and certificates to the participant?	
Yes (The final evaluation tool must be received at lea	st 3 weeks prior to the activity.)	
No (The evaluation and draft certificate must be provi	ded for approval )	

**Note:** MORE Foundation's policy is that a course evaluation must be completed to receive a CME/CE certificate. Summary data will be requested for the evaluation method(s) selected if obtained by joint partner.

Commerc	rcial Support cial Support is allowed for CME activities; however, activities must be developed without the or support of any commercial entity. MORE Foundation must be aware of all financial support	C7, C8, C9, C10
1.	Commercial Support and Exhibits Will this activity receive commercial support (financial or in-kind grants or donations) Note: exhibit not considered commercial support. D No Yes – Request Commercial Support Agreements from MORE Foundation that will be exert to the event. Please list your potential funding sources (if applicable):	
	I have read and will abide by the <u>ACCME Standards for Commercial Support</u> *	
2.	Will this activity receive commercial support that is regarded promotional?	Yes
3.	Will vendor/exhibit tables/booths be allowed at this activity? INO END NO END NO END NO END NO EXHIBITORS IN TRANSPORTED IN THE INFORMATION INTERVIEW INFORMATION IN THE INFORMATION IN THE INFORMATION IN THE INFORMATION INFORMATION INFORMATION INFORMATION INFORMATION INFORMATION INFORMATION INTERVITY INTERVITY INTERVITY. INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY. INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY INTERVITY. INTERVITY INTERVITY INTERVITY INTERVALUE INTERVALUE INTERVALUE INTERVALUE INTERVALUE INTERVALUE INT	] Yes n of
	Online Advertisement	
4.	Would you like this event posted on MORE Foundation's website?	
5.	Would you like this event posted on the ArMA calendar?	

I acknowledge that submission of this application does not constitute approval of CMEs, CNEs, or CEs. There is an application fee, which is not refunded after the CE Committee has reviewed the CME Planning and Application Worksheet.

Applicant/Course Coordinator/Moderator Signature		_Date
Invoices shall be sent to:		
Name/Organization	ATTN:	
Address		
Phone		

E-mail	

Each CME/CE activity application is eligible for review upon presentation to the CE Committee and should include the following:

- 1. All information obtained on application form completed.
- 2. Program agenda (preliminary draft is acceptable)
- 3. Faculty qualification (CV or resume)
- 4. Faculty and planning committee disclosure forms
- 5. Promotional material (draft is acceptable)
- 6. Projected budget, if commercial support or exhibitor fees are planned
- 7. Proposed evaluation form
- 8. Proposed sign-in method
- 9. For enduring materials, provide
  - a. material or link
  - b. permission of presenter(s)

At least 3 weeks prior to the event:

- 1. Powerpoint presentation(s) if peer review is requested in letter of agreement
- 2. Final evaluation form
- 3. Certificate if not provided by MORE Foundation
- 4. Final program agenda, brochures, handouts, etc.
- 5. All promotional/marketing material
- 6. Executed commercial support agreements

Within 60 days of the completion of the CME activity, send the following via e-mail or to: MORE Foundation PO Box 87535 Phoenix, AZ 85080

- 1. Sign-in sheets or other record of those attending
- 2. Powerpoint presentation(s) or other documentation as pertinent for other methods of instruction (e.g. discussion questions for panel discussion)
- 3. Summary of completed evaluations if web-based evaluation is not done by MORE Foundation
- 4. Final budget

Questions can be addressed to: Debra Sietsema at <u>debra.sietsema@more-foundation.org</u> or 623.455.7109

# APPROVAL ACTION

 

 Approved for \_\_\_\_\_\_
 AMA PRA Category 1 Credits™

 Approved for \_\_\_\_\_\_
 Other \_\_\_\_\_CE Hours

 Not approved \_\_\_\_\_

CE Committee Chair Signature \_\_\_\_\_ Date \_\_\_\_\_

Applicant notified: Date \_\_\_\_\_

## http://www.accme.org/requirements/accreditation-requirements-cme-providers/standards-forcommercial-support

Concertization Council Standards to Ensure Independence i Published on Accreditation Council for Continuing Medical Education (http://www.accme.org)

## Standards for Commercial Support: Standards to Ensure Independence in CME Activities

#### Standard 1: Independence

Standard 1.1 A CME provider must ensure that the following decisions were made free of the control of a commercial interest. (See www.accme.org for a definition of a "commercial interest" and some exemptions.) (a) Identification of CME needs; (b) Determination of educational objectives; (c) Selection and presentation of content; (d) Selection of all persons and organizations that will be in a position to control the content of the CME; (e) Selection of educational methods; (f) Evaluation of the activity.

Standard 1.2 A commercial interest cannot take the role of non-accredited partner in a joint provider relationship.

### Standard 2: Resolution of Personal Conflicts of Interest

Standard 2.1 The provider must be able to show that everyone who is in a position to control the content of an education activity has disclosed all relevant financial relationships with any commercial interest to the provider. The ACCME defines "'relevant' financial relationships" as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

Standard 2.2 An individual who refuses to disclose relevant financial relationships will be disqualified from being a planning committee member, a teacher, or an author of CME, and cannot have control of, or responsibility for, the development, management, presentation or evaluation of the CME activity.

Standard 2.3 The provider must have implemented a mechanism to identify and resolve all conflicts of interest prior to the education activity being delivered to learners.

#### Standard 3: Appropriate Use of Commercial Support

Standard 3.1 The provider must make all decisions regarding the disposition and disbursement of commercial support.

Standard 3.2 A provider cannot be required by a commercial interest to accept advice or

services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.

Standard 3.3 All commercial support associated with a CME activity must be given with the full knowledge and approval of the provider.

Standard 3.4 The terms, conditions, and purposes of the commercial support must be

documented in a written agreement between the commercial supporter that includes the provider and its educational partner(s). The agreement must include the provider, even if the support is given directly to the provider's educational partner or a joint provider.

Standard 3.5 The written agreement must specify the commercial interest that is the source of commercial support.

Standard 3.6 Both the commercial supporter and the provider must sign the written agreement between the commercial supporter and the provider.

Standard 3.7 The provider must have written policies and procedures governing honoraria and reimbursement of out-of-pocket expenses for planners, teachers and authors.

Standard 3.8 The provider, the joint provider, or designated educational partner must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with the provider's written policies and procedures.

Standard 3.9 No other payment shall be given to the director of the activity, planning

Page 1 of 3

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committee members, teachers or authors, joint provider, or any others involved with the supported activity.

Standard 3.10 If teachers or authors are listed on the agenda as facilitating or conducting a presentation or session, but participate in the remainder of an educational event as a learner, their expenses can be reimbursed and honoraria can be paid for their teacher or author role only.

Standard 3.11 Social events or meals at CME activities cannot compete with or take precedence over the educational events.

Standard 3.12 The provider may not use commercial support to pay for travel, lodging, honoraria, or personal expenses for non-teacher or non-author participants of a CME activity. The provider may use commercial support to pay for travel, lodging, honoraria, or personal expenses for bona fide employees and volunteers of the provider, joint provider or educational partner.

Standard 3.13 The provider must be able to produce accurate documentation detailing the receipt and expenditure of the commercial support.

## Standard 4: Appropriate Management of Associated Commercial Promotion

Standard 4.1 Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CME activities.

Standard 4.2 Product-promotion material or product-specific advertisement of any type is prohibited in or during CME activities. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided. Live (staffed exhibits, presentations) or enduring (printed or electronic advertisements) promotional activities must be kept separate from CME. For print, advertisements and promotional materials will not be interleafed within the pages of the CME content. Advertisements and promotional materials may face the first or last pages of printed CME content as long as these materials are not related to the CME content they face and are not paid for by the commercial supporters of the CME activity. For computer based, advertisements and promotional materials will not be visible on the screen at the same time as the CME content and not interleafed between computer 'windows' or screens of the CME content. Also, ACCME-accredited providers may not place their CME activities on a Web site owned or controlled by a commercial interest. With clear notification that the learner is leaving the educational Web site, links from the Web site of an ACCME accredited provider to pharmaceutical and device manufacturers' product Web sites are permitted before or after the educational content of a CME activity, but shall not be embedded in the educational content of a CME activity. Advertising of any type is prohibited within the educational content of CME activities on the Internet including, but not limited to, banner ads, subliminal ads, and pop-up window ads. For computer based CME activities, advertisements and promotional materials may not be visible on the screen at the same time as the CME content and not interleafed between computer windows or screens of the CME content. For audio and video recording, advertisements and promotional materials will not be included within the CME. There will be no 'commercial breaks.' For live, face-to-face CME, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CME activity. Providers cannot allow representatives of Commercial Interests to engage in sales or promotional activities while in the space or place of the CME activity. For Journal-based CME, None of the elements of journal-based CME can contain any advertising or product group messages of commercial interests. The learner must not encounter advertising within the pages of the article or within the pages of the related questions or evaluation materials.

Standard 4.3 Educational materials that are part of a CME activity, such as slides, abstracts and handouts, cannot contain any advertising, corporate logo, trade name or a product-group message of an ACCME-defined commercial interest.

Standard 4.4 Print or electronic information distributed about the non-CME elements of a CME activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product-promotion material or product-specific advertisement.

Standard 4.5 A provider cannot use a commercial interest as the agent providing a CME activity to learners, e.g., distribution of self-study CME activities or arranging for electronic access to CME activities.

Page 2 of 3

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## Standard 5: Content and Format without Commercial Bias

Standard 5.1 The content or format of a CME activity or its related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial interest.

Standard 5.2 Presentations must give a balanced view of therapeutic options. Use of generic names will contribute to this impartiality. If the CME educational material or content includes trade names, where available trade names from several companies should be used, not just trade names from a single company.

## Standard 6: Disclosures Relevant to Potential Commercial Bias

Standard 6.1 An individual must disclose to learners any relevant financial relationship(s), to include the following information: The name of the individual; The name of the commercial interest(s); The nature of the relationship the person has with each commercial interest.

Standard 6.2 For an individual with no relevant financial relationship(s) the learners must be informed that no relevant financial relationship(s) exist.

Standard 6.3 The source of all support from commercial interests must be disclosed to learners. When commercial support is "in-kind" the nature of the support must be disclosed to learners.

Standard 6.4 'Disclosure' must never include the use of a corporate logo, trade name or a product-group message of an ACCME-defined commercial interest.

Standard 6.5 A provider must disclose the above information to learners prior to the beginning of the educational activity.

#### Source URL:

http://www.accme.org/requirements/accreditation-requirements-cme-providers/standards-for-comme rcial-support

Page 3 of 3