**Planning Form for Educational Activities—Jointly Provided**

Medical Education Resources (MER) is responsible for ensuring that all activities are planned and implemented in accordance with the requirements of the Joint Accreditation™Interprofessional Continuing Education, the Accreditation Council for Continuing Medical Education (ACCME), the American Nurses Credentialing Center (ANCC), and the Accreditation Council for Pharmacy Education (ACPE). To that end, MER’s adheres to the following principles:

* All activities align with our mission.
* All activities must be for scientific and educational purposes only; the educational content of these activities must be acceptable by the medical profession as being within the basic medical sciences, discipline of clinical medicine, and the provision of healthcare to the public.
* MER is responsible for the planning, implementation, and evaluation of any CE activity for which it chooses to enter a relationship with a non-accredited Joint Provider.
* MER will determine the needs assessment process, learning objectives, design of the educational activity, and final faculty selection.
* MER is responsible for validating the clinical content to ensure compliance with the ACCME Policy on Clinical Content Validation.
* In addition to adhering to all ACCME, ANCC, and ACPE requirements, all activities must comply with the ACCME *Standards for Commercial Support: Standards to Ensure the Independence of CME Activities*, the FDA *Final Guidance on* *Industry‑Supported Scientific and Educational Activities*, and the AMA regulations regarding the Physician’s Recognition Award.

All sections of this application are developed without receiving any advice or guidance, either nuanced or direct, from a commercial interest. In addition, all persons who work on the development of this application, as well as all other aspects of the CME/CE content will disclose all relevant financial relationships with commercial interests to MER. MER has mechanisms in place to identify and resolve all conflicts of interest before the CE activity occurs.

**Part 1: Contact Information-Joint Provider**

|  |  |  |  |
| --- | --- | --- | --- |
| Organization |       | Tax ID |       |
| Address |       |
| City, State, Zip |       |
| Contact |       | Telephone |       | E-Mail |       |

### Part 2: Conflicts of Interest

List all individuals employed or contracted by your organization that are in a position to influence the content of this CE activity. Identified individuals will be required to complete MER’s *COI Disclosure Form*.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name |       | [ ]  Planner/Mgr.  | [ ]  Other: |       |
| Telephone |       | Fax |       | E-Mail |       |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name |       | [ ]  Planner/Mgr.  | [ ]  Other: |       |
| Telephone |       | Fax |       | E-Mail |       |

### Part 3: Topic of CE activity

General topic area of the activity

|  |
| --- |
|       |

### Part 4: Activity Title

|  |  |
| --- | --- |
| Title |       |

### Part 5: Identification of Target Audience

Interprofessional continuing education (ICPE)/CE activities are intended to change the skills/strategy, performance of the healthcare team or patient outcomes. An ICPE/CE activity should be designed to close the identified gap(s). The next step is to identify the audience in which these gaps exist.

Members of the healthcare team that make up the target audience:

|  |
| --- |
|       |

### Part 6: Type of Credit Desired

[ ]  Interprofessional Continuing Education (IPCE); when members from 2 or more professions learn with, from, and about each other to enable effective collaboration and improve health outcomes (2 or more disciplines must be involved in planning; if 2 or more were not involved, please check Non-Interprofessional below). Please check credit types below.

|  |  |
| --- | --- |
| [ ]  CME (MD, DO) | [ ]  AAPA (Physician Assistants) |
| **[ ]** ANCC (Nurses) | **[ ]** ADA CERP **(**Dentists) |
| [ ]  ACPE (Pharmacists) | **[ ]** ASWB (Social Work) |
| [ ]  CDR (Dietitians) | **[ ]** APA (Psychologists) |

[ ]  Non-Interprofessional Continuing Education; planning by 1 profession (Please check credit types below).

|  |  |
| --- | --- |
| [ ]  CME (MD, DO) | [ ]  AAPA (Physician Assistants) |
| **[ ]** ANCC (Nurses) | **[ ]** ADA CERP (Dentists) |
| **[ ]** ACPE (Pharmacists) | **[ ]** ASWB (Social Worker)  |
| [ ]  CDR (Dietitians) | **[ ]** APA (Psychologists) |

[ ]  Maintenance of Certification (MOC)\*

*(Please indicate specialty board)*

[ ]  American Board of Anesthesiology

[ ]  American Board of Internal Medicine

[ ]  American Board of Ophthalmology

[ ]  American Board of Otolaryngology, Head & Neck Surgery

[ ]  American Board of Pathology

[ ]  American Board of Pediatrics

Part 7: Educational Design

The educational methodology should reflect the educational gaps, potential outcomes and the learning objectives identified. MER ensures that adult learning principles are taken into account when selecting appropriate educational design.

**Content of the activity**

Describe how this activity matches the intended learners’ current or potential scope of professional practice?

|  |
| --- |
|       |

**[ ]  Live Activity**

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  Symposium | [ ]  Lecture Series | [ ]  Teleconference | [ ]  Webinar |
| [ ]  Webcast | [ ]  Simulation | [ ]  Videoconference |  |
| [ ]  Other |       |

|  |  |  |  |
| --- | --- | --- | --- |
| Date:       | Location:       | [ ]  One-time Activity | [ ]  Repeating Activity |

[ ]  **Enduring Material**

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  Monograph | [ ]  Newsletter | [ ]  CD-ROM/DVD | [ ]  Mobile CME |
| [ ]  Internet\* | [ ]  Podcast | [ ]  Journal Supplement |  |
| [ ]  Other |       |
| Planned Release Date |       |
| \*Internet-platform name & contact |  |

**Part 8: Identification of Professional Practice Gaps, Needs, and Desired Outcomes**

CE activities are meant to foster the continuing professional development of physicians, nurses, allied health professionals, and the healthcare team. Educational offerings are intended to increase skills/strategy, improve performance, or improve patient outcomes.

The table below identifies **(a)** professional practice gaps (the difference between what actually occurs in practice and what should occur in practice); **(b)** knowledge, competence, or performance need that is causing the practice gap; **(c)** desired outcome or change that should occur as a result of the activity.

Knowledge = “Knowing something”

Skills/strategy (Competence) = Gap in skills, “Knowing how to do something”

Performance = Gap in practice “What one actually does in practice”

Identify all different sources (e.g., scientific evidence from the literature; opinion from clinical or scientific experts; quality data, information from the general public, the media and/or other environmental sources; observed data from local or national databases; and/or surveys from past participants or prospective learners).

(*Sample table in attachment A at the end of this document*)

|  |  |  |
| --- | --- | --- |
| **Professional Practice Gap**  | **Underlying Need (Please describe specific need expressed in terms of Knowledge, Skills/strategy, Performance, patient outcomes)** | **Desired Outcome or Change (strategies must be a change in skills/strategy, performance, or patient outcomes) that should occur as a result of the activity** |
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 | *
 | *
 |

References:

**BARRIERS THAT NEED TO BE OVERCOME** include the variety of issues the target audience and healthcare team face that may contribute to the practice gaps. Barriers may be a variety of issues including but not limited to systems barriers, cost, patient adherence, time, reimbursement, etc.

|  |
| --- |
| **Barriers That Need to Be Overcome** |
| *
 |

### Part 9: National, specialty-specific practice guidelines that will be included in the content

|  |
| --- |
|       |

### Part 10: Learning Objectives (*please use verbs to start your objectives from the list included in Attachment B)*

**Learning Objectives:**

As a result of this activity, the participant should be better able to:

|  |
| --- |
| *
 |
| *
 |
| *
 |
| *
 |
| *
 |

### Part 11: Core Healthcare Team Competencies and MER Target Areas

Describe how this activity/educational intervention fits the context of desirable attributes of the healthcare team: (Core competencies for Interprofessional Collaborative Practice)

|  |  |
| --- | --- |
| [ ]  Values/ethics for interprofessional practice | [ ]  Interprofessional communication |
| [ ]  Roles and responsibilities | [ ]  Teams and teamwork |
|  |  |

What Target Areas of knowledge strategies or behaviors will the healthcare team implement or change in their practice of medicine as a result of this activity?

[ ]  Medical knowledge. [ ]  Guideline awareness and consideration

[ ]  Choice of screening and diagnostic tools [ ]  Employ evidence-based practice

[ ]  Provide patient-centered care [ ]  Treatments and prescribing practices

[ ]  Patient communication. [ ]  Comunication with healthcare team

### Part 12: Faculty

Criteria to be used when instructors are selected may include the following: demonstrated expertise in the content area; ability to communicate effectively with the target audience; and willingness to meet the educational needs that have been identified as part of this planning process. Instructors must understand and be able to guide the participants toward the expected outcomes (change in competence, performance, or patient outcomes).

Course Director (chairperson) and his/her affiliation.

|  |  |
| --- | --- |
| Name |       |
| Affiliation |       |

Process used to identify the Course Director (chairperson):

|  |  |
| --- | --- |
| [ ]  Prior Working Relationship | [ ]  Noted Authorities |
| [ ]  Review of resume/CV | [ ]  Clinical Investigator |
| [ ]  Recommendation by Medical/Scientific Experts | [ ] Other |       |

Faculty members, their affiliations, and the process used to select them:

|  |  |  |
| --- | --- | --- |
| Name |  | Title and Affiliation |
|       |  |       |

Process used to identify the faculty:

|  |  |
| --- | --- |
| [ ]  Prior Working Relationship | [ ]  Noted Authorities |
| [ ]  Review of resume/CV | [ ]  Clinical Investigator |
| [ ]  Recommendation by Medical/Scientific Experts | [ ] Other |       |

|  |  |  |
| --- | --- | --- |
| Name |  | Title and Affiliation |
|       |  |       |

Process used to identify the faculty:

|  |  |
| --- | --- |
| [ ]  Prior Working Relationship | [ ]  Noted Authorities |
| [ ]  Review of resume/CV | [ ]  Clinical Investigator |
| [ ]  Recommendation by Medical/Scientific Experts | [ ] Other |       |

|  |  |  |
| --- | --- | --- |
| Name |  | Title and Affiliation |
|       |  |       |

Process used to identify the faculty:

|  |  |
| --- | --- |
| [ ]  Prior Working Relationship | [ ]  Noted Authorities |
| [ ]  Review of resume/CV | [ ]  Clinical Investigator |
| [ ]  Recommended by Medical/Scientific Experts | [ ] Other |       |

**Part 13: Learner Feedback and Active Learning**

Learners will provide feedback and demonstrate active learning in the following ways:

|  |
| --- |
| [ ]  Participation in case discussion |
| [ ]  Question and answers during or after the activity |
| [ ]  Pre and/or post surveys |
| [ ]  Audience Response questions |
| [ ]  Role play |
| [ ]  Engaging learners in dialogue |
| [ ]  Other (please specify)       |

### Part 14: Evaluation

Methods of evaluation used:

|  |
| --- |
| [ ]  Evaluation form |
| [ ]  Pre and/or post test |
| [ ]  Return demonstration |
| [ ]  Case study analysis |
| [ ]  Follow-up survey or test (indicate, 30, 60,90 days post) |
| [ ]  Longitudinal study with self-reported change in practice |
| [ ]  Other (please specify)       |

### Part 15: Financial Management [Detailed budget attached]

The costs to plan, produce, and deliver this CE activity will come from:

[ ]  Registration Fees

[ ]  Purchase of materials by participants

[ ]  Commercial Support

Exhibits are considered promotional and separate from commercial support. MER requires separation of these two funding sources to ensure compliance with accreditation and regulatory guidelines.

The creation of CE content must strictly adhere to all pertinent ACCME Essential Areas and the Standards for Commercial Support. MER will only sponsor activities that promote improvements or quality in healthcare and not the proprietary interests of any commercial organization. All relevant financial relationships with commercial interests must be disclosed so that processes to resolve any conflicts of interest may be implemented prior to the CE activity. Further, the management of commercial support must adhere to the ACCME’s Standards for Commercial Support. In all cases, education must be separated from promotion. Disclosure to the learners of relevant financial relationships and any commercial support of the activity must also occur.

Commercial entities providing support for the activity

|  |  |
| --- | --- |
| Organization |       |
| Address |       |
| City, State, Zip |       |
| Telephone |       | Fax |       | Contact |       |
| Product(s) Manufactured or Marketed by the Potential Commercial Entity that are Related to the Medical Subject of the Activity |       |

|  |  |
| --- | --- |
| Organization |       |
| Address |       |
| City, State, Zip |       |
| Telephone |       | Fax |       | Contact |       |
| Product(s) Manufactured or Marketed by the Potential Commercial Entity that are Related to the Medical Subject of the Activity |       |

**Attachment A – Example Completed Section 6**

|  |  |  |
| --- | --- | --- |
| **Professional Practice Gap**  | **Underlying Need(s) (Please describe specific need and express in terms of Knowledge, Skills/strategy, Performance or Patient Outcomes)** | **Desired Outcome or Change (must be a change in Skills/strategy, Performance, or Patient Outcomes) that should occur as a result of the activity** |
| * Only 10% of patient with alcohol dependence have a chance of getting care according to benchmarks.
 | * Physicians may not be aware of the epidemiology of alcohol dependence.
 | * After educating physicians on the epidemiology, they will have improved ability and strategies to identify patients with alcohol dependence.
 |
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| --- |
| **Attachment B – Verbs That May Be Used in Developing Learning Objectives** |
|  |
|  |  |
| **Knowledge** | **Comprehension** | **Application** | **Analysis** | **Syntheses** | **Evaluation** |
| define | describe | apply | analyze | arrange | appraise |
| list | discuss | complete | appraise | assemble | assess |
| name | explain | construct  | calculate | collect | choose |
| recall | express | demonstrate | categorize | compose | compare |
| relate | identify | dramatize | compare | construct | estimate |
| repeat | locate | employ | contrast | create | evaluate |
| underline | report | illustrate | criticize | design | judge |
| state | restate | interpret | debate | formulate | measure |
| summarize | review | operate | diagram | manage | rate |
|   | tell | practice | differentiate | organize | score |
|   | translate | schedule | distinguish | plan | select |
|   |   | sketch | examine | prepare |  |
|   |   | use | experiment | propose |   |
|   |   |  | inspect | revise  |   |
|  |   |   | inventory |  set up |   |
|   |   |   | question |   |   |
|   |   |   | relate |   |   |
|   |   |   | solve  |   |   |
|   |  |   | test |   |   |
|  |  |  |  |  |  |
| **Alphabetical listing of approved verbs:** |  |  |  |
| analyze | construct | distinguish | inspect | practice | schedule |
| apply | contrast | dramatize | interpret | prepare | score |
| appraise | create | employ | inventory | propose | select |
| arrange | criticize | estimate | judge | question | set up |
| assemble | debate | evaluate | list | rate | sketch |
| assess | define | examine | locate | recall | solve  |
| calculate | demonstrate | experiment | manage | relate | state |
| categorize | describe | explain | measure | repeat | summarize  |
| choose | design | express | name | report | tell |
| collect | diagram | formulate | operate | restate | test |
| compare | differentiate | identify | organize | review | translate |
| complete | discuss | illustrate | plan | revise | underline |
| compose |  |  |  |  | use |
| **Behavior words that are not measurable (do not use)** |  |  |  |
| appreciate | enjoy | memorize |  |  |  |
| become aware of | grasp the significance of | motivate |  |  |  |
| believe | increase | recognize |  |  |  |
| communicate | implement |  realize |  |  |  |
| comprehend | learn |  understand |  |  |  |
|  |  |  |