



# Guide to Planning CME/CE and Documentation of Compliance

Name of Activity:

Activity Date:  Internal Code:  Course Director:

Type of Activity:  Live-In Person  Live-Internet Simulcast  Enduring Internet  Enduring-Other  Journal-Based CME  
*(check all applicable)*  
 Other:

## Professional Practice Gaps and Needs

State the PROFESSIONAL PRACTICE GAPS of your learners on which the activity will be based (i.e., what is the issue you are trying to address?)  
*(maximum 100 words)*

Is the underlying cause of the gaps that you identified related to knowledge, competence or performance? (in the boxes to the right, be specific about the cause): *(maximum 50 words each)*

... knowledge need: and/or

... competence need: and/or

*[COMPETENCE means the ability to apply knowledge to practice]*  
*[PERFORMANCE means actual implementation in practice]*

... performance need: and/or

State WHAT THE ACTIVITY WILL BE DESIGNED TO CHANGE in terms of learners' competence or performance or patient outcomes:  
*(maximum 50 words)*

## Appropriate Learners for this Activity

Based on the above needs assessment, state the audiences that should participate in this activity:

Physicians (state specialty/ies):

The Healthcare Team (state disciplines):  Nurses  Nurse Practitioners  Physician Assistants

Pharmacists Other:

## Learning Objectives by Discipline:

State learning objectives for each applicable discipline according to the "SMART" principle (S=Specific, M=Measurable, A=Achievable, R=Realistic, T=Timebound)  
*(50 words maximum for each category)*

... for  
physicians:

... for nurses,  
NPs, PAs:

... for  
pharmacists:

... for other  
professionals:

## Ancillary Tools to Enhance Learning Outcomes

Describe an ancillary tool that will be provided to learners to assist in the transfer of learning into practice

*[NOTE: This does not include PowerPoint handouts but could include such tools as patient information, checklists and algorithms.]*

## Educational Formats and Design

What formats will you incorporate into this activity?  Didactic  Q&A  Simulation  Case Study  Role Play  Game

Other:

Explain why the educational format selected above is appropriate for this activity:

*(maximum 25 words)*

## Quality Framework for This Activity

If this activity addresses a clinical guideline or standard of care, indicate the title and its source/citation.

N.A.

## Collaborations and Partnerships

If you are collaborating with another department/agency/organization for this activity, state the names and associated roles.

N.A.

## Measurement of Educational Outcomes

The educational outcomes measurements for this CME activity must match the "What this activity was designed to change" section on page 1 of this document. Therefore, please indicate below the outcomes types as you stated on page 1, and then for (1) **for 'competence' outcomes** either a case vignette with multiple choice answers that encapsulates the key points of your activity content or questions that will capture the ability of the learner to apply a strategy to practice based on the knowledge learned; and, (2) **for 'performance' outcomes**, one or two questions that can be asked of learners two-to-four months after the activity to measure if the change you anticipated was actually implemented in practice.

For **Measurement of Competence**, write a case vignette and accompanying multiple choice strategy answers:

Case  
Vignette  
*encapsulating  
the key  
learning from  
this activity*

Multiple  
choice  
strategy 1

Multiple  
choice  
strategy 2

Multiple  
choice  
strategy 3

**- OR -**

Question that measures  
practice strategy

Multiple choice answers  
*(check answer that is correct):*

	<input type="checkbox"/>		<input type="checkbox"/>
	<input type="checkbox"/>		<input type="checkbox"/>

For **Measurement of Performance**, write one or more questions that will determine if learner has actually implemented key outcomes in practice:

Thank you for collaborating with <name of provider> to plan this <CME><CE> activity. To submit this Planning Guide and Document to us, please click on the 'E-Mail Form' button to the right, which will automatically populate an e-mail in Outlook and attach this document to the e-mail message; or, to print and fax a copy, click on the 'Print Form' button to the right and fax to us at <enter fax number>.