

CME Planning Basics

This section of the website presents an overview of the Continuing Medical Education (CME) planning process. The section provides access to templates and forms that will help both in planning CME activities, and in working through the AMDA joint sponsorship application process. To ensure compliance with the *Standards and Elements of the Accreditation Council for Continuing Medical Education (ACCME)*, Planning Committee members and Speakers for CME activities need to understand the basics of producing CME, and their roles in that process. The CME planning process begins with identification of learners' professional practice gaps, and the establishment of a needs assessment based on those identified gaps. We work in collaboration with AMDA establishes the needs assessment that is used to plan CME activities. The Chapter President selects members of the Planning Committee to work on planning the CME activity. A fundamental part of the CME planning process is timely collection of disclosure information. Once selected, Planning Committee members are asked to complete a financial disclosure form. Planning Committee members select CME session topics based on needs assessment data and work together to identify appropriate speakers for the chosen topics. After financial disclosure forms are collected from all speakers, the disclosure information is used to identify conflicts of interests (COIs), or the lack thereof, for all individuals in a position to control CME content. When disclosure information indicates a conflict exists, steps must be taken to resolve the identified COI. The methods employed to resolve identified conflicts must be documented for the joint sponsorship application file. The disclosure process is complete only once disclosure information is presented to learners prior to the CME activity, and after they are given the opportunity to evaluate whether they perceived bias in the presentation of the CME activity. Planning Committee members establish overall

objectives for the CME activity and work with the speakers to ensure appropriate objectives are established for the individual topics of the CME activity. Objectives must be communicated to learners prior to the presentation of the CME content. Speakers work to create the CME content to meet these objectives. Speakers are responsible for [Content Validation](#) of the CME activity, specifically they must ensure:

- All the recommendations involving clinical medicine in a CME activity must be based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients.
- All scientific research referred to, reported or used in CME in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection and analysis.

When CME content receives Commercial Support, ACCME's Standards for Commercial Support require a signed Letter of Agreement (LOA) between the Commercial Interest and the CME Provider. Acknowledgement of all commercial support must be presented to learners prior to the presentation of CME content. Draft promotional materials must be submitted to the Provider at least 30-days prior to publication for approval of ACCME elements. Syllabus, or other materials presented to learners must be submitted with the joint sponsorship application and are the proper place to present ACCME required elements which include:

- Schedule of CME activities which includes the date(s), times and location of the activity and the names of speakers including credentials and affiliations
- ACCME Accreditation Statement and CME/CMD Credit Designation Statements
- Planning Committee and Speakers' Disclosures
- Overall and content specific Objectives

- Meeting Fees (if applicable)
- Target Audience information
- Acknowledgement of Commercial Support (if any)
- Evaluation instrument

The joint sponsorship application and its accompanying forms document:

- Needs assessment/objectives/desired outcomes
- Names of Planning Committee members involved in CME activity
- Names of speakers for CME activity
- Draft of income/expenses for CME activity
- Documentation of honoraria payments for CME activity
- Draft brochure and marketing materials

The final component of the CME planning process is the post meeting report due to the CME Provider within 30-days of the meeting. This report includes:

- List of attendees indicating physicians and non-physicians
- Number of credits issued
- Final budget
- Evaluation summary
- Final copy of all on site and promotional materials

See the Sample Planning Documents page for links to downloadable joint sponsorship files.*See the [ACCME Glossary of Terms](#) for definitions of italicized words.