



## Steps for Joint Providership: The CME Application Process (as of 8/25/14)

**A complete application MUST include the following items (*check off each requirement when completed*):**

**CME Mission:** *To provide CME activities that will focus on the professional practice gaps of our physician audience by integrating improvements in the participants' competence or performance. The activities will focus on evidence-based medicine [i.e. clinical and new concepts in medical diagnosis, therapeutics, rehabilitative or preventive medicine] or public health topics as well as on non-clinical education such as: practice management, risk management, emergency preparedness, medical technologies, regulatory topics, and legislative issues.*

### Step 1

- \_\_\_\_\_ Choose a Course Director (must be a physician) to actively participate in the planning process, to oversee the development of the CME activity, and to monitor while "in progress." The Course Director must be involved in the entire planning process which starts with identifying the *professional practice gap*, reviewing the CME content of the activity, ensuring the validity of its scientific soundness (evidence-based), and helping to comply with the ACCME's Standards for Commercial Support (SCS). This can be accomplished by helping to identify and/or resolve any potential conflicts of interest (COI), along with the Subcommittee on Joint Providership, and monitoring the live/enduring activity throughout its duration.
- \_\_\_\_\_ The Course Director should also be involved in identifying your target audience.

### Step 2

***Professional Practice Gap:*** *When there is a gap between what the professional is doing or accomplishing compared to what is "achievable" on the basis of current professional knowledge.*

- \_\_\_\_\_ The Course Director needs to identify a *professional practice gap* (educational needs) that has been documented via actual research/evidence and data involving or addressing the needs of your physician audience or that of their patients. Then determine if this activity should focus on changing the physician's competence or performance. "Competence" can be described as the ability to apply knowledge, skills or judgment in practice.
- \_\_\_\_\_ Attach the documentation (with evidence/data) that supports the identified *professional practice gap* for this CME activity.
- \_\_\_\_\_ Based on the established *professional practice gap* for this activity, the Course Director, along with members of the faculty member(s), needs to formulate the desired learning outcomes (objectives) for the CME audience and include them on the meeting notice. The desired learning outcomes (or strategies)

are meant to empower the physician learners to make changes within their medical practice and/or profession for the sake of quality improvement.

Passive learning objectives such as: “need to better understand...,” “will learn about...,” “should be able to describe...” no longer will constitute appropriate learning strategies or desired learning outcomes. In example, more appropriate desired learning outcomes (or strategies) can include:

***Upon completion of this CME activity, participants should be able to:***

- Ask their patients two symptomatic questions that they were not previously asking.
- Adopt one of the new and more effective ways to communicate with their healthcare team.
- Take the extra step to electronically document the type of follow up needed with their patients.

\_\_\_\_\_ Next, have the course director and faculty member(s) choose an appropriate and descriptive title that relates to the overall CME content.

### **Step 3**

\_\_\_\_\_ Work directly with the faculty member(s) and course director on choosing an appropriate learning format (i.e. panel discussion, case studies, hands-on applications, group discussion, etc.) and meeting setting that will best support the desired learning outcomes (learning objectives) for this CME activity.

\_\_\_\_\_ Request that all faculty member(s), including the Course Director, provide their Bio or CV and complete the Faculty Disclosure Form (***the Speaker’s full name, title & all disclosures must be listed on the meeting notice or course materials***). Also, financial disclosures need to be secured from all members from your organization involved in the CME planning process and content development such as: planning committee or council members, course director(s), meeting planning coordinator, etc.

### **Step 4**

\_\_\_\_\_ Identify the number of CME credits your activity will be worth (subtracting any time for breaks, lunches, special introductions, and any non-CME discussions or business).

\_\_\_\_\_ Refer to the Fee Schedule to determine the appropriate application fee, making sure to submit a check (or credit card payment information) with your CME Application.

### **Step 5**

\_\_\_\_\_ Put together an Activity Outline or Schedule (***can be including on the meeting notice***).

\_\_\_\_\_ Discuss how the CME activity, faculty members, and content presented will be evaluated by the CME participants and by CMS.

### **Step 6**

\_\_\_\_\_ Complete the budget developed for this activity including all revenue, expenses, commercial support (i.e. educational grants, exhibits and/or *in-kind* donations). **Note:** Double-click on the Excel ***spreadsheet*** to be able to enter your calculations and to activate the worksheet.

\_\_\_\_\_ Allow yourself plenty of time to apply for commercial support, if needed, and make sure to fill out the Letter of Agreement (LOA). All commercial support and disclosures must be disclosed on the meeting notice or course materials (***refer to the ACCME’s Standards for Commercial Support (SCS) in this packet***).

- \_\_\_\_\_ Be sure to choose an appropriate activity location, date, and time. The planning process should begin at least 4 months out if any commercial support is to be secured. CMS requires a minimum of 75 days prior to your CME activity's scheduled presentation date for appropriate and timely consideration.
- \_\_\_\_\_ Design the meeting notice (**refer to the Meeting Notice Preparation and Meeting Notice Sample**).



**Caution:** *Promotional materials, including CME information, cannot be distributed until the Subcommittee grants written approval for CME credit. A "Save-the-Date" notice is acceptable; however, this type of preliminary notice can only include the basics of the event such as date, time, title, name of joint provider, and meeting location. Use of the Chicago Medical Society's name, logo, accreditation statement and/or anything about CME credit is prohibited until written approval has been secured by the CMS office.*

### Step 7

- \_\_\_\_\_ Fill out the "CME Category 1 Credit Application" (*this form must be completed either online or electronically*).
- \_\_\_\_\_ Submit the CME Activity Category 1 Credit Application and all of the required documents to the Chicago Medical Society (**at least 75 days prior to your CME activity's date**).
- \_\_\_\_\_ Once you receive notification from the Chicago Medical Society that your activity was approved by the Subcommittee on Joint Providership, you will be able to distribute your promotional meeting notices.

### Step 8

- \_\_\_\_\_ Be sure to pass out and collect all required evaluation materials during the CME activity.
- \_\_\_\_\_ Upon conclusion of the CME activity, submit the follow-up CME materials within 30 days (*refer to After the Activity form in this packet*).



### Questions?

**Contact:** Haydee Nascimento, Director of Education at (312) 670-2550 or [hnascimento@cmsdocs.org](mailto:hnascimento@cmsdocs.org)

**Congratulations!**

**You have completed the CME application process.**

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