**All jointly provided activities undertaken by the Postgraduate Institute for Medicine (PIM) are planned and implemented in accordance with the Joint Accreditation Criteria for Accreditation and all other accrediting body requirements that may apply to this activity. Accordingly:**

* PIM will be the final authority for all aspects of the planning process, including, but not limited to, the gap analysis, learning objectives, activity design, faculty selection, and evaluation metrics.
* All activities must comply with the ACCME *Standards for Integrity and Independence in Accredited Continuing Education*, the FDA *Final Guidance on* *Industry‑Supported Scientific and Educational Activities*, and, if designed for physician learners, the AMA Opinions regarding the Physician’s Recognition Award and *Gifts to Physicians from Industry*.
* All activities must be for scientific and educational purposes only; the educational content of activities must be accepted by the profession(s) constituting the target audience as being within the science/scope of practice of the intended audience(s), and applicable to the provision of healthcare to the public.

### Organization

|  |  |  |  |
| --- | --- | --- | --- |
| Organization |  | Tax ID |  |
| Address |  |
| City, State, Zip |  |
| Telephone |  | Fax |  | Website |  |

### Primary Contact

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name |  | Telephone |  | Email |  |

### Organization Planners

List all individuals employed (or contracted) by your organization that are or will be in a position to control the content of this accredited continuing education activity [*identified individuals will be required to complete a financial relationship/conflict of interest reporting form*].

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name |  | [ ]  Planner  | [ ]  Other: |  |
| Telephone |  | Email |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name |  | [ ]  Planner  | [ ]  Other: |  |
| Telephone |  | Email |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name |  | [ ]  Planner  | [ ]  Other: |  |
| Telephone |  | Email |  |

### Activity

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

* 1. Identify the general topic area to be discussed in the activity [*i.e., cardiology, oncology, women’s health, ethics, etc.*].

|  |
| --- |
|  |

* 1. Define the subject to be discussed in the activity [*i.e., heart failure, ovarian cancer, depression, pain management, end of life care, etc.*].

|  |
| --- |
|  |

### Short Description of Activity*This section is required if the activity will be added to CME Passport*

|  |
| --- |
| Provide a description of the activity for learners (About 175 words or less) |
|  |

### Professional Practice Gaps and Educational Needs

What problems are you trying to solve? What are your learners doing that they should not be doing; or, conversely, not doing that they should be doing? Please briefly describe below:
*At least one reference is required and should be documented in the Source/Citation(s) box.*

|  |  |  |
| --- | --- | --- |
| **Current Behavior or Patient Care (Identified Gap)** | **Desired Behavior/Patient Outcomes** | **Content Focus** |
|  |  |  | Knowledge |
|  | Competence |
|  | Performance |
|  | Patient Outcomes |
|  |  |  | Knowledge |
|  | Competence |
|  | Performance |
|  | Patient Outcomes |
|  |  |  | Knowledge |
|  | Competence |
|  | Performance |
|  | Patient Outcomes |

|  |
| --- |
| Source/Citation(s): |

In general terms, what education is needed to close these gaps?

|  |
| --- |
| **Educational Need** |
|  |

***Attach Additional Sheets if Needed to Document More Gaps and Educational Needs***

### Learning Objectives

Based on the gap(s) stated above, list learning objectives for the activity that indicate what you want the learner to be able to do upon completing the activity [*i.e. each objective should include a verb that describes an action by the learner (not what the teacher will teach)*].

|  |
| --- |
| **Learning Objectives** |
| 1. |
| 2. |
| 3. |
| 4. |
| 5. |

See **Appendix A** for a list of verbs for writing learning objectives. For example: Describe the method of action of [a specific drug]; Use standardized, validated tools for cardiac risk assessment.

### Target Audience

* 1. Geographic Location

|  |  |
| --- | --- |
|  | Internal Only |
|  | Local/Regional |
|  | National |
|  | International |

* 1. Indicate the profession(s) of the intended learner

|  |  |  |  |
| --- | --- | --- | --- |
|  | Physician |  | Psychologist |
|  | PA |  | Social Worker |
|  | Registered Nurse |  | Dentist |
|  | Nurse Practitioner/APRN |  | Optometrist |
|  | Pharmacist |  | Dietician |
|  | Pharmacy Technician |  |  |
|  | Other:  |

* 1. If the audience includes physicians, what physician competencies will this activity be designed to address?

|  |  |
| --- | --- |
|  | ABMS/ACGME - Patient Care and Procedural Skills |
|  | ABMS/ACGME - Medical Knowledge |
|  | ABMS/ACGME - Practice-based Learning and Improvement |
|  | ABMS/ACGME - Interpersonal and Communication Skills |
|  | ABMS/ACGME - Professionalism |
|  | ABMS/ACGME - Systems-based Practice |
|  | Institute of Medicine - Provide patient-centered care |
|  | Institute of Medicine - Work in interdisciplinary teams |
|  | Institute of Medicine - Employ evidence-based practice |
|  | Institute of Medicine - Apply quality improvement |
|  | Institute of Medicine - Utilize informatics |

* 1. Is this activity intended to be **interprofessional continuing education (IPCE)**, wherein an interprofessional team (i.e.; physicians and nurses; physicians and psychologists, etc.) develops and presents the content to members of the same professions, emphasizing team-based, collaborative action?

**Please see Appendix B for a checklist to evaluate whether this activity is IPCE.**

|  |  |
| --- | --- |
| [ ]  Yes | [ ]  No |

* 1. If yes, what IOM interprofessional collaborative practice competencies is this activity designed to address?

|  |  |
| --- | --- |
|  | Interprofessional Education Collaborative - Values/Ethics for Interprofessional Practice |
|  | Interprofessional Education Collaborative - Roles/Responsibilities |
|  | Interprofessional Education Collaborative - Interprofessional Communication |
|  | Interprofessional Education Collaborative - Teams and Teamwork |

### Educational Design

1. Identify the format of the proposed activity [*double click the appropriate box(es)*].

|  |  |
| --- | --- |
|  | **Live Activity** |
|  | Symposium |  | Lecture Series |  | Teleconference |
|  | Live Webinar |  | Simulation |  | Multi-day Conference |
|  | Q&A Session(s) |  | Case Discussion |  | Panel Discussion |
|  | Small Group Discussion |  | Case Presentation |  | Hands-on Activity |
|  | Skill Demonstration |  | Other:  |

|  |  |
| --- | --- |
| [ ]  One-time Activity | [ ]  Repeating Activity |

|  |  |
| --- | --- |
| **Date(s)** | **Location(s) – *Please include zip code, needed by the ACCME*** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
|  | **Enduring Material** |
|  | Internet-based |  | Podcast |  | Journal-Based |
|  | Internet PoC |  | Monograph |  | Performance Improvement |
|  | Newsletter |  | Other:  |

|  |  |
| --- | --- |
| Planned Release Date |  |

1. Where will the enduring material be hosted?

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Internal LMS |  | freeCME |  | Print material |
|  | CME University |  | ReachMD |  | Medscape |
|  | PowerPak |  | Healio |  | Other: |
|  | myCME |  | Epocrates |

1. Adult learners attain better results when they are engaged in their own learning. What interactive method(s) will be used?

|  |  |  |  |
| --- | --- | --- | --- |
|  | Case Studies |  | Audience Response System/Polling Questions |
|  | Q&A |  | Other: |

1. Provide a rationale for the educational format and/or methods chosen for instruction See **Appendix C** for a list of educational formats and their rationale.

|  |
| --- |
| Rationale: |

1. Planned Outcomes Measures

|  |  |
| --- | --- |
|  | Pre-Survey |
|  | Posttest |
|  | Audience Response questions/Polling Questions |
|  | Follow-up survey |
|  | Case vignette |
|  | Other (describe): |

 *If requesting PIM to complete outcome studies, additional fees may apply.*

### System/Educational Barriers and Opportunities

As part of the educational design, the activity should provide strategies to remove, overcome, or address barriers to change in the skills/strategy or performance of the individual professional or healthcare team.

|  |  |
| --- | --- |
|  | This activity has no known, relevant barriers that can be addressed with educational interventions |
|  | The following barriers have been identified and will be addressed in the educational intervention |
| Identified System Barrier | Planned Discussion in Activity Content |
|  |  |
|  |  |

### Faculty Planning Leadership

|  |  |
| --- | --- |
| **Faculty Name and credentials (Indicate Course Director)** | **Title and Affiliation** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### Credit Desired

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | AMA (MDs, DOs) |  | ANCC (RNs, APRNs, NPs) |  | ACPE (Pharmacists) |
|  | AAPA (PAs) |  | APA (Psychologists) |  | ADA (Dentists) |
|  | COPE (Optometrists) |  | ASWB (Social Workers) |  | CDR (Dieticians) |
|  | Other: |

|  |  |
| --- | --- |
| Anticipated Number of Credits |  |

 Will this course include Maintenance of Certification (MOC) credit? \*

|  |  |
| --- | --- |
| [ ]  Yes | [ ]  No |

 If yes, which board(s)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Will this course be registered for the Merit-based Incentive Payment System (MIPS) program? \*

|  |  |
| --- | --- |
| [ ]  Yes | [ ]  No |

\**Additional fees may apply for adding MOC credit or MIPS if not already under contract.*

### Activity Support

|  |  |
| --- | --- |
| **Proposed sources of funding:** |  |
| **Funding already received:** |  |
| **In-kind support:** |  |

1. **Other Activity Information**

**This activity includes (please check all that apply):**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Engages the healthcare team |  | Engages patients and/or the public |  | Engages medical students |
|  | Advances public health data |  | Addresses population health |  | Public health collaboration |
|  | Optimizes communication skills |  | Optimizes technical/ procedural skills |  | Creates individual learning plans |
|  | Utilizes support strategies |  | Improves performance |  | Improves healthcare quality |
|  | Improves community health |  | Other: |

**THIS COMPLETES THE PLANNING DOCUMENT PROCESS – THANK YOU!**

**Return Planning Document to:**

Postgraduate Institute for Medicine

Email: information@pimed.com

# PIM Use Only

Date Received: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Approved for Joint Providership

[ ]  Provisional Approval, Pending: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Denied, Reason: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Approved for IPCE

Activity Type (ACPE, if applicable)

[ ]  Knowledge [ ]  Application

Topic Designator (ACPE, if applicable)

 [ ]  01 - Disease State Management/Drug Therapy [ ]  05 - Patient Safety

 [ ]  02 - AIDS Therapy [ ]  06 - Immunization

 [ ]  03 - Law Related to Pharmacy Practice [ ]  07 – Compounding

 [ ]  04 - General Pharmacy [ ]  08 - Pain Management

ASWB Credit Type (if applicable)

 [ ]  Clinical [ ]  Ethics [ ]  Cultural Competency

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PIM Clinical Staff Member Date

**APPENDIX A**

**VERBS FOR WRITING LEARNING OBJECTIVES**

**Verbs for Use in Stating Cognitive Outcomes**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Knowledge** | **Comprehension** | **Application** | **Analysis** | **Synthesis** | **Evaluation** |
| Define | Explain | Apply | Analyze | Arrange | Appraise |
| List | Express | Employ | Appraise | Create | Assess |
| Recognize | Describe | Demonstrate | Calculate | Design | Choose |
| Record | Discuss | Illustrate | Categorize | Develop | Compare |
| Repeat | Identify | Interpret | Classify | Diagnose | Decide |
| State | Restate | Perform | Compare | Formulate | Estimate |
|  | Translate | Practice | Contrast | Hypothesize | Evaluate |
|  |  | Use | Criticize | Manage | Judge |
|  |  |  | Debate | Organize | Justify |
|  |  |  | Diagram | Plan | Measure |
|  |  |  | Differentiate | Prepare | Rate |
|  |  |  | Distinguish | Propose | Score |
|  |  |  | Outline | Summarize | Select |

**Verbs for Use in Stating Affective Outcomes**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Receiving** | **Responding** | **Valuing** | **Organization** | **Value Complex** |
| Accept | Answer | Complete | Adhere | Act |
| Ask | Assist | Follow | Defend | Discriminate |
| Choose | Compile | Form | Integrate | Display |
| Follow | Greet | Initiate | organize | Influence |
| Reply | Help | Join |  | Practice |
| Show |  | Share |  |  |
|  |  | Study |  |  |

**Verbs for Use in Stating Psychomotor Outcomes**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Perception** | **Set** | **Guided****Response** | **Mechanism** | **Complex** | **Adaption** | **Origination** |
| Detect | Begin | Copy | Assemble | Assemble | Adapt | Arrange |
| Differentiate | Proceed | Follow | Construct | Construct | Change | Compose |
| Identify | React | React | Display | Display | Revise | Construct |
|  | Respond | Reproduce | Manipulate | Manipulate | Vary | Create |
|  | Start |  | Work | Operate |  | Design |
|  |  |  | Write | Work |  |  |

**Words that should not be used as cognitive objectives**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Increase | Expand horizons | Approach | Appreciate | Become |
| Know | Really know | Grasp the significance of | Improve | Grow |
| Learn | Thinks critically |  |  |  |

**APPENDIX B**

**CHECKLIST FOR DECIDING IF AN ACTIVITY IS INTERPRFESSIONAL CONTINUING EDUCATION**

**Definitions**

IPCE: Educational activities in which members of the healthcare team (does not need to be the entire, all-inclusive team - can be task or problem oriented) that are planned BY, FOR, and WITH the team; the focus is on collaborative practice.

*Note: Members of the team are not restricted to physician, pharmacist, APRN/RN, PA, social worker, or optometrist, although at least one of these is desirable for reporting purposes. A team could be a pharmacist, diabetes educator, and a dietician, for example.*

Interdisciplinary CE: Members of the target audience all fall within one profession, such as physicians. Example: cardiologist, cardiovascular surgeon, interventional radiologist, anesthesiologist, internal medicine - all part of the target audience for an activity on heart disease. *Therefore, Interdisciplinary CE is not IPCE.*

Parallel Learning: When 2 or more professions are in the audience and learn about a specific subject that applies to their work, but the activity does not address unique roles they play in the delivery of care. Example: oncologists, pharmacists, and registered nurses all need to know about the efficacy and safety of immune therapy agents in cancer, but the activity does not address how these 3 interact in the provision of care. *Therefore, Parallel Learning is not IPCE*.

**GRANT REQUESTS AND APPLICATIONS**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkmark with solid fill** | **IPCE (team learning)** | **Checkmark with solid fill** | **Not IPCE** |
|  | \*At least one practice or knowledge gap for the activity is team focused - using terms like team, collaboration, interprofessional, communication |  | Terms used in gaps: referral, interdisciplinary, multidisciplinary, consult, clinical management |
|  | The professions in the target audience go beyond the MD/DO, NP, PA – because these may or may not collaboratively practice in the care of a patient |  | The professions in the target audience are just MD/DO, NP, PA  |
|  | \*The planners, faculty, and reviewers\*\*) identified has members from at least 2 of the professions in the target audience (e.g., physicians AND pharmacists; NPs AND Social Workers) *\*\*PIM reviewers may count towards this requirement* |  | The planning committee identified is all physicians (regardless of specialty) |
|  | \*At least one learning objective addresses behavior that is within the scope of practice of the entire team (often communication, patient safety, psychosocial, or ethics focused) |  | All learning objectives address diagnosis and medical management of a particular disease state and do not expand beyond the role of a physician/NP/PA  |

***\*Required for the activity to be IPCE; suggested edits to grant applications and PIM Planning Documents are encouraged if IPCE is desired but not quite met based on the attributes outlined above. PIM Staff will work with partners to modify as needed.***

**CONTENT**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checkmark with solid fill** | **IPCE (team learning)** | **Checkmark with solid fill** | **Not IPCE** |
|  | \*The content contains discussion of roles/responsibilities/scope of practice, or communication/collaboration of at least 2 professions in the target audience |  | The content is focused only on the scope of practice of one profession; although another profession may be mentioned, it is in terms of the primary profession directing the action of the secondary profession, rather than collaboration |

***\*Required for the activity to be IPCE***

**APPENDIX C**

**EDUCATIONAL FORMATS AND THEIR RATIONALE1**

|  |  |
| --- | --- |
| **Format** | **Rationale** |
| Lecture/Presentation | Provide a large amount of information (knowledge) in a limited amount of time. Allows faculty to talk about a chosen topic. |
| Panel Discussion | Provide an opportunity for experts or a group of learners to present differing viewpoints on a topic, issue, or problem to other panelists and the audience (learners). |
| Self-Directed Learning/Computer-aided instruction/Journal | Provides an opportunity for adults to learn the subject at their own pace. An effective method of providing active learning with immediate feedback and re-enforcement. |
| Group Discussion | Provides an opportunity for learners to think together constructively for purposes of learning, solving problems, making decisions, and/or improving human relationships. |
| Case Study | Provides an account of an actual problem or situation an individual or group has experienced. An effective method of provoking controversy and debate on issues for which definite conclusions do not exist. |
| Problem Solving | Provides the opportunity got learners to solve a problem through the collection, application, and assessment of information. An effective teaching strategy method used to encourage learners to inquire into and think critically about a topic. |
| Role Play | Provides learners with the opportunity to experience common human relations problems, practice communication skills in a secure environment. |
| Brainstorming | Solicits creative ideas or to identify possible solutions to problems. Allows learners to express opinion and ideas without the treat of being judged by other learners. |
| Demonstration | Models the correct step by step procedures needed when performing a specified task |
| Role Modeling/Mentoring | Provides the learner with one-on-one access to experts. Learning takes place over time with opportunities to reflect, apply, and question. |
| Journal Club | Provides a format for discussion of journal articles. Useful for a group with similar interests to share opinions and discuss published literature in an organized, face to face fashion.  |
| M&M | Provides a safe venue for presentation of cases by learners with possible untoward outcomes. Allows peer interaction with current problems in practice. |
| Patient Simulation | Provides a standardized method for a group of physicians to compare their individual skills of diagnosis, treatment, and management of a patient with their peers. |
| Games | Provides an interactive and competitive process to validate new learning in a positive emotional situation. |
| Chart Audit | Peer or Self |

*1Adapted from Effective Adult Learning by Birkenholz*