

Online CME Activity Planning Process

The abbreviated planning grid below gives you a quick overview of the process and timeline. Subsequent pages provide additional details about each phase.

Phase Description	Timeline
<p><u>Phase 1 - Consultation on Proposed Online Activity</u></p> <p>Consult and collaboratively assess new activity concept to determine if request is in alignment with Stanford Center for Continuing Medical Education (SCCME) mission:</p> <ul style="list-style-type: none"> • Clarify online activity concept • Review six phase cycle of planning • Review roles and responsibilities • Identify financial backstop • Determine go/no go decision 	<p>11 months in advance of activity anticipated release date</p>
<p><u>Phase 2 – Activity Pre-Planning</u></p> <p>Establish the basic structure of the activity:</p> <ul style="list-style-type: none"> • Identify Planning Committee • Establish planning timeline • Gather Course Director(s) and planner documents and resolve all financial conflicts 	<p>10 months in advance of activity anticipated release date</p>
<p><u>Phase 3 – Activity Planning</u></p> <p>Complete CME Application: The CME Application facilitates and documents the planning process by addressing elements that are both helpful and required by our accrediting body (ACCME):</p> <ul style="list-style-type: none"> • Review application components • Identify professional practice gaps that exist between current and best practices • Develop learning objectives and assessment methods • Develop course outline • Identify potential speakers/faculty • Develop instructional design overview document • Develop marketing plan • Develop budget and receive financial approval from Department Chair • Submit Internal Commercial Support Request as appropriate 	<p>9 -10 months in advance of activity anticipated release date</p>
<p><u>Phase 4 –Activity Approval</u></p> <p>Review/modify and approve the CME Application</p> <ul style="list-style-type: none"> • Submit final draft of CME Application with supporting documents for approval • Approve CME Application, instructional design overall document and other supporting documents 	<p>8 months in advance of activity anticipated release date</p>

Online CME Activity Planning Process

Phase Description	Timeline
<p><u>Phase 5 – Activity Production and Release</u></p> <p>On-going Development of Activity</p> <p>Activity Production:</p> <ul style="list-style-type: none"> • Develop initial educational content and subsequent content elements – video, slides, animation, case questions and posttest • Review content for HIPAA and CME compliance • Obtain necessary copyright permissions • Develop marketing strategy and materials • Develop activity evaluation • Promote activity on Stanford Web sites • Submit expenses for payment <p>Activity Release:</p> <ul style="list-style-type: none"> • Post content on OpenEdX platform • Conduct time test with 3 testers to determine amount of credit • Review and approve final online content • Publish activity on CME Web site and Stanford Online • Implement marketing plan, if budgeted 	<p>7 months in advance of activity anticipated release date</p>
<p><u>Phase 6 – Post-Release Activity Support and Reporting</u></p> <p>Support learner needs, monitor the on-going activity and assess activity outcomes:</p> <ul style="list-style-type: none"> • Respond to activity inquiries and support registration as needed • Continue marketing, if budgeted • Send performance evaluations to learners monthly, if planned • Send quarterly report of participation and evaluation results to Course Director(s) • Complete expense settlements and reconcile budget yearly • Send a Final Report to Course Director(s) within three month of the expiration date for debriefing meeting 	<p>Activity release to expiration date</p> <p>Final Report: Within three months of expiration date</p>

Online CME Activity Planning Process

Phase 1 - Consultation on Proposed Online Activity

Contact the Stanford Center for Continuing Medical Education (SCCME) **at least 11 months** in advance of the proposed activity release date to ensure the necessary time to discuss the activity **concept and its planning, approval, and promotion.**

The SCCME evaluates new activity proposals to make sure that they are consistent with the Center's mission. The Center must also ensure that there are sufficient resources to support the proposed activity and the Stanford Department/Institute/Division requesting the CME activity is prepared to financially backstop activity deficits. The consultation results in a collaborative decision regarding the appropriateness of the concept for certified CME.

Key tasks include:

- Clarify online activity concept
- Review six phase cycle of planning
- Review roles and responsibilities
- Identify financial backstop
- Determine go/no go decision

Phase 2 – Activity Pre-Planning

In this phase, the Course Director (a Stanford School of Medicine physician faculty member) establishes a Planning Committee and coordinates the activity planning process with the support of the CME Online Programs Manager. More than one planner is recommended and required if the Course Director has a conflict of interest relevant to the subject matter of the activity. These planners will be responsible for completing the CME Planning Documentation Worksheet and Application ("CME Application") in Phase 3. The SCCME Online Programs Manager and Coordinator will facilitate the planning and implementation process.

At this stage all Course Director and planner disclosure forms must be received and reviewed. Should any faculty member have a conflict of interest, a non-conflicted Course Director, or his/her appointee, must resolve that conflict.

Key tasks include:

- Identify Planning Committee
- Establish planning timeline
- Gather Course Director(s) and planner documents and resolve all financial conflicts

Online CME Activity Planning Process

Phase 3 – Activity Planning

Activity planning is the responsibility of the Course Director and includes identifying professional practice gaps that exist between current and best practices and determining the educational content that will address those gaps. The Course Director creates the content outline and identifies potential faculty. Working with the CME Instructional Designer, the Course Director completes an instructional design document which includes the overall goal of the activity, the learning objectives, the target audience, the media to be used and the educational outcomes assessment methods. The Course Director works with the CME Marketing and Evaluations Coordinator to develop a marketing plan. After consulting with the CME Instructional Designer and staff members of Stanford Educational Technology group, the Course Director in collaboration with the CME Online Programs Manager develops the budget and obtains financial approval from the Department Chair.

In addition, an Internal Commercial Support Request will need to be developed and submitted to the Strategic Advisory Committee if commercial support is being sought for the activity.

The Stanford CME Application is the primary vehicle used to facilitate and document the planning process so that all important activity elements are addressed and Accreditation Council for Continuing Medical Education (ACCME) regulatory requirements are met.

The CME Application must be approved prior to promotion and/or advertising of the CME activity. For this reason, an activity application must be completed and submitted to Stanford Center for CME **8 months** in advance of the anticipated release of the activity.

Key tasks include:

- Review application components
- Identify professional practice gaps that exist between current and best practices
- Develop learning objectives and assessment methods
- Develop course outline
- Identify potential speakers/faculty
- Develop instructional design overview document
- Develop marketing plan
- Develop budget and receive financial approval from Department Chair
- Submit Internal Commercial Support Request as appropriate

Online CME Activity Planning Process

Phase 4 – Activity Approval

In this phase, the CME Application and supporting documents are submitted to SCCME by the Course Director. The SCCME staff review the CME Application and instructional design overall document, note necessary additions or modifications, and work with the Course Director on supplementing the application with missing information. Once fully complete, the Application and instructional design overall document are sent for final accreditation review. If no additional modifications are required, the CME Application and supporting documentation are sent to the Associate Dean for Postgraduate Medical Education for final approval.

Key tasks include:

- Submit final draft of CME Application with supporting documents for approval
- Approve CME Application, instructional design overall document and other supporting documents

Phase 5 - Activity Production and Release

During activity production, the faculty works with the CME Instructional Designer and the staff of Stanford Educational Technology to develop the content of the activity, which may include video, slides, animation, case questions and posttests. The CME Online Programs Manager reviews the content for HIPAA and CME compliance. The CME Online Programs Coordinator obtains the necessary copyrights for materials used in the activity. The CME Online Programs Coordinator also develops the activity evaluation and creates the activity in the CME database to track participation. The CME Marketing and Evaluations Coordinator develops the marketing strategy and marketing materials and oversees the promotion of the upcoming activity on Stanford Web sites and in other venues based on the marketing plan. Expenses related to production are submitted as received for prompt payment.

Activity Production:

- Develop initial educational content and subsequent content elements – video, slides, animation, case questions and posttest
- Review content for HIPAA and CME compliance
- Obtain necessary copyright permissions
- Develop marketing strategy and materials
- Develop activity evaluation
- Promote activity on Stanford Web sites
- Submit expenses for payment

Once production is complete, the activity is posted on the OpenEdX platform. The Course Director identifies three representatives of the target audience who complete the activity so that the appropriate amount of CME credit is awarded to participants. The Associate Director, CME and the CME Online Programs Manager conduct a final review of the online content. Once the

Online CME Activity Planning Process

online content is approved, the CME Marketing and Evaluations Coordinator publishes the activity on the CME Web site and Stanford Online, and implements the marketing plan, if budgeted. All promotional materials including brochures, online postings, marketing emails, and posts to social media networks must be reviewed and approved by the SCCME prior to printing, posting and/or sending.

Activity Release:

- Post content on OpenEdX platform
- Conduct time test with 3 testers to determine amount of credit
- Review and approve final online content
- Publish activity on CME Web site and Stanford Online
- Implement marketing plan, if budgeted

Phase 6 – Post-Release Activity Support and Reporting

During the time that the activity is certified for CME credit, the CME staff monitors the activity and provides on-going email and phone support for learner needs and questions. As online activities are ongoing, ideally funds were budgeted to provide for continued marketing throughout the life of the activity. If so, the CME Evaluations and Marketing Coordinator will implement ongoing marketing.

If performance assessment was planned for the activity, the CME Online Programs Coordinator oversees the distribution of the survey each month to learners who have completed the activity.

The CME Online Programs Manager analyzes participation, posttest scores and evaluation responses and sends a quarterly report to the Course Director(s). Three months after the credit expiration date, the CME Online Programs Manager produces a Final Report and sends it to the Course Director(s) for a debriefing meeting to review the success of the activity in achieving its objectives.

At the end of each fiscal year that the activity is certified, participation and evaluation summaries are completed and the budget is reconciled.

Key tasks include:

- Respond to activity inquiries and support registration as needed
- Continue marketing, if budgeted
- Send performance evaluations to learners monthly, if planned
- Send quarterly report of participation and evaluation results to Course Director(s)
- Complete expense settlements and reconcile budget yearly
- Send a Final Report to Course Director(s) within three months of the expiration date for debriefing meeting