Name of Policy: College of Medicine & Life Sciences: CME Activity Planning Process **Policy Number**: 3364-81-12-206-01 **Approving Officer**: Dean of the College of Medicine Vice Provost for Health Education **Responsible Agent**: Associate Dean for Continuing Medical Education **Scope**: UT Faculty, Staff, Students and Joint Sponsors	**Revision date:** 10/14/2026 **Original effective date**: 10/1/09
☐ New policy proposal	☒ Minor/technical revision of existing policy
☐ Major revision of existing policy	☐ Reaffirmation of existing policy

(A) Policy statement

All CME activities seeking designation for AMA PRA Category 1 Credit™ must adhere to established planning processes and meet specific organizational criteria. To ensure compliance with ACCME standards and institutional policies, all activities must be developed and implemented with the direct involvement and approval of the University of Toledo CME Office, under the oversight of the CME Director or the Assistant Dean for Continuing Medical Education.

(B) Purpose of policy

- ACCME's Essential Areas and Elements, including the Standards for Integrity and Independence in Accredited Continuing Education, and
- The documentation and planning criteria required to certify activities for **AMA PRA Category 1 Credit™**.

(C) ACCME Essential Area 2: Educational Planning

The University of Toledo CME Office is committed to using a planning process that:

- Identifies professional practice gaps in knowledge, competence, or performance,
- Links these gaps to measurable educational needs and desired outcomes,
- Clearly communicates the purpose and objectives of each CME activity in advance, and
- Presents content in full compliance with ACCME disclosure and commercial support policies.

(D) Procedure

To ensure CME activities are educationally sound and compliant, the following steps must be followed:

1. **Planning Committee Formation**
   A planning committee must be established to oversee the activity and ensure it meets ACCME criteria. Each committee member is required to complete a UT CME Disclosure of Financial Relationships Form.
2. **Submission Timeline**
   A completed CME application form must be submitted to the UT CME Office no less than 60 days prior to the activity date.
3. **Needs Assessment**
   The planning process must include the identification of gaps in knowledge, competence, or performance relevant to the physician audience and appropriate to their scope of practice.
4. **Development of Learning Objectives**
   Objectives must be clearly stated and directly address the identified practice gaps. They should articulate what the activity is designed to change in terms of learner competence, performance, or patient outcomes.
5. **Faculty and Content Selection**
   Faculty should be chosen based on expertise and ability to present evidence-based, unbiased content. All presenters must disclose relevant financial relationships prior to the activity, and content must be free of commercial influence.
6. **Disclosure and Conflict of Interest Mitigation**
   All individuals involved in planning or delivering the content must disclose relevant financial relationships. The planning committee will review disclosures and take appropriate steps to mitigate potential conflicts of interest. All disclosures (or the absence thereof) must be communicated to learners prior to the activity.
7. **Budget and Commercial Support Management**
   If applicable, a detailed budget must be developed. Any commercial support, including educational grants, must be managed in compliance with ACCME Standards for Commercial Support. Exhibits or promotional materials must be separate from the educational space.
8. **Evaluation and Outcomes Measurement**
   Based on the identified needs, the planning committee must evaluate the activity's impact on learner outcomes. This includes assessing changes in knowledge, competence, performance, or patient care as a result of the activity.

Approved by: **/s/**_____ Imran Ali, M.D. Dean of the College of Medicine & Life Sciences Vice Provost for Health Education 10/14/26_____ Date *Review/Revision Completed by:* *CME Advisory Committee* *Associate Dean for Continuing Medical Education*	**Policies Superseded by This Policy:** • *A-10-12-00001-0206 CME Planning Process (former Health Science Campus CME policy, previously updated December 2005)* Initial effective date: 9/1/01 Review/Revision Date: • 10/1/09 • 8/06/12 • 04/13/15 • 09/15/15 • 02/12/19 • 6/8/22 • 08/19/25 • 10/14/26 Next review date: 10/14/2029