

SUBMITTING A PRE-PLANNING FORM



OFFICE *of* CONTINUING
MEDICAL EDUCATION
Quillen College of Medicine

EAST TENNESSEE STATE UNIVERSITY

WHAT IS A PRE-PLANNING FORM?

- The Pre-planning Form is the first step of the application process.
- Completion of this short form allows the Office of CME the chance to review your proposed activity and assign a CME Planner to assist you in completing the appropriate CME application or to request additional details.
- The following slides will walk you through the completion of the Pre-planning Form and the elements that will be required for submission.

I. LOG INTO YOUR ACCOUNT

QUILLEN
COLLEGE of MEDICINE
EAST TENNESSEE STATE UNIVERSITY

Welcome Registration

Welcome

Existing Account

Please enter your email address and password.

Email Address:

highmarkstest@gmail.com

Password:

Sign In

Forgot your Password? [Get it now!](#)

Create New Account

* - indicates a required item.

* First Name:

* Last Name:

Medical Center/Hospital/Company:

* Email Address:

Create Account & Sign In

EAST TENNESSEE STATE
UNIVERSITY

Quillen College of Medicine | [Login](#)

You can access the login page by visiting our website at etsu.edu/com/cme or ww2.highmarksce.com/etsu/

If you have not already created an account, you may do so by filling out the fields under 'Create a New Account' on the right hand side of the screen.

2. MY APPLICATIONS

The screenshot displays the Quillen College of Medicine website interface. At the top, the logo for Quillen College of Medicine, East Tennessee State University, is visible. Below the logo is a navigation bar with the following items: Welcome, Registration, Courses, Exhibitors, HighMarks Test, My Account, My Credits, My Assessments, My Online Courses, My Applications (circled in red), My Activity Center, Applications to Review, My Required Forms, and Sign Off. The main content area is titled 'My Account' and contains a message: 'To review or update your account information please click on the "Edit Account Information" button below. The email address you have entered will be used for all communications. If you want to use a different email address, click the "Edit Account Information" button to change your contact information.' Below this message is a green box with the text: 'You have successfully signed into the system. Use the "Sign Off" option to exit the site.' To the right of this box is a 'My Orders' button. Under the 'Account Information' section, the following details are listed: HighMarks Test, MD; ETSU; PO Box 70572; Johnson City, TN 37614; 123-456-7890; and highmarkstest@gmail.com. Below this information are three buttons: 'Edit Account Information', 'Bio', and 'Preview'. The 'Curriculum Vitae (CV) Documents' section contains a message: 'Use this section to upload your CV.' Below this message is a green box with the text: 'No documents have been uploaded.' To the right of this box is an 'Upload CV' button. The footer of the page features the East Tennessee State University logo and name.

Once you have logged into your account, select 'My Applications' from the menu at the top of the page.

3. START A NEW PRE-PLANNING FORM



QUILLEN
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Welcome Registration

[HighMarks Test](#) [My Account](#) [My Applications](#) [Sign Off](#)

My Applications

Use this section to manage one or more applications.

How to Submit an Application:

1. Click on the "Start New Pre-planning Form" button.
2. Complete all information and click "Submit."
3. The form will be reviewed by the CME Office.
4. You will receive further information about the next step in the process via email.

How to Edit or Complete an Application:

1. Incomplete applications can be continued by clicking on the title of the event.
2. An application cannot be edited once it is finalized and pending review.

If you have any questions, contact mabekh@etsu.edu.

No applications have been submitted.

Start New Pre-Planning Form

Start New Learning from Teaching

I. Click the 'Start New Pre-Planning Form' button.

4. ANSWER THE REQUIRED PRE-PLANNING QUESTIONS

Submit Pre-Planning Form

Use the tabs below to complete the form. Required items are noted in **red text** and must be completed prior to submission. The Title tab must be completed and saved before working in any other tab.

**Please be sure to click Save before moving on to (or clicking) the next tab.
Any unsaved data will be lost.
Please do not use the browser's back button to navigate to the previous page.**



1. Title 2. Main Contact 3. Pre-Planning 4. Preview 5. Finalize

* Title

Please provide the proposed title of this activity.

Remaining: 300

Check Spelling

* Sponsoring Organization

* Activity Start Date

This pre-planning form is the first step of the application process. Activity fee schedules are based on the date of approval of the full applications.
[Click here for more information.](#)

* Activity End Date

Save

The Pre-Planning Form will take you through a series of questions on three tabs to gather the necessary information about your proposed educational activity. Be sure to follow the instructions found at the top of each page.

The full CME Application must be submitted 90-120 days prior to the proposed activity date, depending upon your need to apply for educational grant funding. Applications received less than 90 days from the activity date will incur an additional late application fee.

No application may be considered that is received less than 60 days in advance of the proposed activity date.

To see information about application and other CME fees please click the text link 'Click here for more information' to be taken to the fee schedule.

MAIN CONTACT TAB



Welcome Registration Courses Exhibitors

HighMarks Test My Account My Credits My Online Courses My Applications My Activity Center Applications to Review My Required Forms Sign Off

Submit Pre-Planning Form

Use the tabs below to complete the form. Required items are noted in red text and must be completed prior to submission. The Title tab must be completed and saved before working in any other tab.

Please be sure to click Save before moving on to (or clicking) the next tab.
Any unsaved data will be lost.
Please do not use the browser's back button to navigate to the previous page.



262 - Fgdgdf Incomplete

1. Title 2. Main Contact 3. Pre-Planning 4. Preview 5. Finalize

*Main Contact

Use the fields below to identify people who will be involved in the planning and administration of this activity.

Will you be the Main Contact for this activity/application?

Yes No

If you are not the Main Contact, the system will guide you through finding or adding a new individual.



If you will be the main contact for the activity throughout the application process, click 'Yes' here and your information will automatically be added.

If you are submitting this application but are not the main contact, click 'No' and you will be taken to a search page. Enter the name or email address of the main contact person and click "Search." Once found, select the main contact person and click 'Assign Main Contact.'

** If the person you are looking for does not appear in the search results they will need to create a profile in the HighMarks system before they can be assigned to any role.

1. Title 2. Main Contact 3. Pre-Planning 4. Preview 5. Finalize

*Find Main Contact

Use one or more of the options below to search for an individual.

First Name:

Last Name:

Preferred Email:

Search

1. Title 2. Main Contact 3. Pre-Planning 4. Preview 5. Finalize

*Select Main Contact

Select the Main Contact whom to add to this application.

Return to Search Options

Main Contact	Name	Preferred Email	City, State	Country
<input checked="" type="radio"/>	Wolf, Elizabeth	wo***@et***.edu	Johnson City, TN	United States

Assign Main Contact

PRE-PLANNING TAB

Submit Pre-Planning Form

Use the tabs below to complete the form. Required items are noted in **red text** and must be completed prior to submission. The Title tab must be completed and saved before working in any other tab.

Please be sure to click Save before moving on to (or clicking) the next tab.

Any unsaved data will be lost.

Please do not use the browser's back button to navigate to the previous page.

262 - Fgdgdf

Incomplete

1. Title 2. Main Contact 3. Pre-Planning 4. Preview 5. Finalize

*Pre-Planning

* - indicates a required item.

1. Has this activity been accredited in the past by ETSU Office of CME?

Yes No

* If yes, please enter the last accredited year below.

Remaining: 500

* 2. What specific changes would you like to see as a result of this education?

Remaining: 500

* 3. For this to occur, whose behavior would have to change?

Remaining: 500

* 4. What specific behaviors need to change to accomplish the desired outcomes stated in Question 2?

Remaining: 500

Move through each of the five tabs to answer the required questions about the proposed activity. Be sure to click "Save" at the bottom of each page.

* 5. What information sources did you use to determine the need? You will be asked to provide articles or documentation from the data sources you select within the full application.

- Newspapers & local media
- Research literature or findings
- National benchmarks, guidelines, safety goals, etc.
- Healthcare data (local, regional or national)
- Surveys or feedback from the target audience
- Institutional or organizational data
- Specialty society guidelines
- Hospital quality improvement data
- Your patient population
- Other (specify):

* 6. What educational strategy or format will best change these behaviors?

Live Presentation (in person or on-line)

- Conference (Live)
- Grand Rounds (Live)
- Other RSS
- Webinar or broadcast
- Skills Session or simulations (hands-on learning)
- Enduring Materials: Printed, recorded, or computer-presented activity
- Other format, or a description of the combination above:

* 7. Do you intend to apply for educational grant funds specific to this activity?

Yes No

Save

FINALIZE TAB

Any incomplete items will be shown in red on the Finalize Tab. The Pre-planning form cannot be submitted until all required elements are completed.

If you are interrupted, be sure to save your work. You can complete the form later without starting over. The incomplete form will be found under 'My Applications' and marked as incomplete. Click on the activity title to resume work.

WHAT HAPPENS AFTER THE SUBMISSION OF YOUR PRE-PLANNING FORM?

- Once submitted, the Pre-planning Form will be reviewed by the Office of CME. Please allow up to three business days for review.
- If further clarification is needed someone from the Office of CME will reach out to the submitter for more information.
- Once approved, the submitter will receive an automatic email with detailed instructions for the next steps of the application process. You will also be contacted by the CME Planner assigned to assist you for the duration of this activity.
- The next step in the process is the completion of the full application based on the type of activity proposed in the Pre-planning Form. Your assigned CME Planner will work with you to ensure you understand all of the requirements.

**FOR INFORMATION ON THE NEXT
STEP, PLEASE SEE THE 'SUBMITTING A
FULL APPLICATION' GUIDE.**

Thank you!