

10 EASY STEPS TO DESIGNATE CREDIT FOR CE ACTIVITIES

Contact the Accreditation Office prior to planning

- Contact Accreditation Office to plan a CE educational activity;
- Meet with Accreditation Office to discuss (May be via phone) Contact should occur no less than **10 weeks** prior to the activity launch date

Complete request for CE using the Duke Joint Accreditation Application found at <https://ja.dh.duke.edu> and submits. The following are required to complete the application process

- An agenda, with start times and end dates, presentations and faculty presenters
- A completed budget, indicating expenses and projected income from grant support or registration fees
- A list of planning committee members for all represented professions (determined by target audience), along with completed disclosure forms, **prior to credit designation**
- CVs or bios for all committee planning members and speakers, as requested
- Copies of all advertising materials (brochures, save-the-date flyers, Website announcements) for review and approval (materials may not be disseminated until approval is given)

Duke reviews application to ensure completion and provides feedback within five (5) business days

- Duke ensures learning objectives and evaluation tools are aligned by target audience and profession
- Changes and modifications to the application may be requested at this time

Duke provides guidance on the process for submitting grant requests to potential funders

- Duke must designate credit before actual submission of grant
- Grant agreements are submitted to Duke OCR for legal review and approval
- Duke ensures that commercial supporters and Duke fully execute any grant agreements prior to acknowledgement in marketing materials or syllabi
- Exhibitors must complete a Hold Harmless Agreement and Accreditation Office must receive these prior to acknowledgement in marketing materials or syllabi

Prepare and submit to Duke draft marketing materials (save-the-date card, brochure, email announcement, website, etc)

- Duke reviews (within 3 business days following receipt)

Work together with Accreditation Office to ensure all conflict of interests have been resolved

- Duke will review the disclosure information for each individual and take any additional necessary steps to resolve any potential conflicts of interest prior to the activity

Prepare and submit draft syllabus for review

- All disclosure forms must be received in order for materials to be approved
- All grant agreements must be fully executed (co-signed by Duke) before the syllabus can be approved
- All exhibitor forms (hold harmless agreements) must be signed by Client before the syllabus can be approved
- Duke reviews and approves the syllabus within 6 business days following receipt

Following the CE activity, submit the following within 14 days

- Electronic copy of participant list, depicting first name, last name, and email addresses of participants who request CE credit, as applicable
- Completed rosters (or sign-in sheets) for live activities
- The printed brochure, enduring materials, marketing materials and copy of the syllabus
- Final budget report, listing all income and actual expenses
- Copies of commercial support grant checks and/or check numbers and date paid, as applicable