



## 7 Steps to Course Approval & Credit Designation

1. If you need help creating a CE activity, contact Duke Continuing Education at [CEPD-JAC@dm.duke.edu](mailto:CEPD-JAC@dm.duke.edu)
2. Log in to [Duke Continuing Education](#), click “Activity Application,” and complete a “[New Application](#)”
3. Submit all **REQUIREMENTS** below for approval **8 weeks prior to promotion/marketing** of the CE activity:
  - **Activity Agenda** including all start-times, and end-times. *\*No credit awarded for breaks, lunches, welcomes*
  - **Activity Budget** including all expenses, all projected income from grant support, and all registration fees
  - **Disclosure Forms** for all planning committee members must be completed via the digital [Disclosure Form](#)
    - CE activities require a planning committee member **from each profession representing the target audience**
    - Planning committee members must **submit disclosures prior to planning the CE activity**
    - CE Program Specialist **mitigates all relevant financial relationships prior to planning the CE activity**
    - **\*Additional speakers must resolve any conflict of interest & submit disclosures 1 week before activity starts**
    - CE activity administrators can view & track all active disclosures on the [CE Disclosure Dashboard](#)
  - **Marketing Materials**, including brochures, “save-the-date” flyers, and website announcements
    - Brochures, flyers, and website announcements **may not be disseminated until approval is given**
    - Planners can promote *unapproved* activities **with NO mention of CE credit** on marketing materials
  - **Presentation Slides & Videos** must be sent to CE Program Specialist at least 1 week prior to CE activity start-date
4. **The Duke CE Program Specialist will review your application & create CE activity on Duke CE site.**
  - CE Program Specialist ensures learning objectives are **aligned by profession with the target audience**
  - CE Program Specialist mitigates all relevant financial relationships & then approves CE Activity Application
  - CE Program Specialist creates CE activity on [Duke CE Site](#) & sends credit designation letter to department
  - Planning committee members may request changes & modifications to the application during this time
5. **If the activity includes grant funding and/or commercial support, you must do the following:**
  - Department requesting credit must send grant agreements with fund code to Duke OCR for legal approval
  - Confirm completed grant agreements **prior to** acknowledgement in marketing materials and/or syllabi
  - Collect exhibitor Hold Harmless Agreements **prior to** acknowledgement in marketing materials and/or syllabi
6. **The Duke Continuing Education team will collaborate with you to finalize the CE activity.**
  - Submit finalized marketing materials & links (brochures, flyers, emails, websites, etc.) to CE Program Specialist
  - Ensure that **all disclosure forms have been received & all conflicts of interest resolved prior to CE activity**
  - Confirm all grant agreements are fully executed (co-signed by Duke) prior to syllabus approval
  - Confirm all exhibitor forms (hold harmless agreements) are signed by exhibitors prior to syllabus approval
7. **Within 14 days after the CE activity, you must submit the following to [CEPD-JAC@dm.duke.edu](mailto:CEPD-JAC@dm.duke.edu):**
  - Excel spreadsheet roster with **3** columns for **First Name, Last Name, & Email** of all CE activity participants
  - If the CE activity offers pharmacy credit, please include **2** columns for **NABP# and PIN#** on the roster
  - Finalized budget report, listing all actual income and expenses