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

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*
   - **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:
   - 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