Live Course Checklist

Please submit the applications 8 weeks prior to the course. Please refer to the [Course Admin Resources](#) listed under the Help Center on the [Duke CEPD Website](#) to find instructional materials and other required documents. If Duke CEPD does not have all requirements on file during the specified timeframes below, Duke CEPD has the right to withdraw credit. If you have any questions, please contact [CEPD](#)

Prior to Submitting the Application
☐ **Activity Agenda:** A detailed breakdown of the entire program with start & end times for each session. No credit awarded for breaks, lunches, welcomes, Intros. Please reference CE Agenda Example in the *[Course Admin Resources](#)*.   ☐ **Activity Budget:** including all expenses, all projected income from grant support, registration fees, and vendor fees.   ☐ **Grant Funding:** If your event involves grant funding, please submit all grants as soon as possible.   ☐ **Disclosure Forms:** All disclosures should be complete before submitting the application. Please track disclosures via the [Disclosure Dashboard](#) and reach out to retrieve any outstanding disclosures that still need to be completed.   ☐ **Needs Assessment:** Evidence-based educational need supporting documentation is required to support the application.

8 Weeks before the Activity/ Program
☐ **Agenda & Speakers:** *MUST* be finalized. Last minute changes lead to issues that could result in the loss of credit.   ☐ **Marketing Materials:** including brochures, "save-the-date" flyers, and website announcements. Marketing must be approved and contain the correct accreditation statement, logo(s), and Credit Amount. (You may not promote an activity until you have the Designation Letter).   ☐ **Grant Agreements:** Signed and Co-Signed by Duke CE. (You may not provide grant information on marketing materials/syllabus unless the Duke CE Office has fully executed the grant agreement)   ☐ **Hold Harmless Agreements:** All exhibitors must sign an agreement, **this is not negotiable, nor are the terms of the agreement.** Please remember that we must follow ACCME and Duke University Health System rules as well.   ☐ **Designation Letter**: You will receive once the Duke CE office has all of the required elements (Above) and the application.

2 weeks before the Activity/ Program
☐ **Presentation Materials:** Speakers should begin submitting their presentations for review. Presentations are due NO LATER than one week (7 Days) prior to the activity/program. **The Duke CE Office must approve all presentations.**   ☐ **Mitigation:** The Duke CE Office will provide mitigation steps for the Course Admin to relay to the presenters.

1 week after the Activity/ Program
☐ **Attendance Roster**: In Excel format with 3 columns: First Name, Last Name, & Email of all CE activity participants   ☐ **Finalized Budget:** listing all actual income and expenses.   ☐ **Post summary:** Please submit a document in the form of a summary or evaluation assessing the effectiveness of the course.