Clinical Education & Professional Development

Contact Clinical Education and Professional Development prior to planning
- The Activity Director/Associate contacts CEPD to plan a CE educational activity. Contact should occur no less than 6-8 weeks prior to the activity launch date
- Review CE Policies

Associate completes request for CE using the Online Joint Accreditation Application and submits. The following are required to complete the application process
- An agenda, with start times and end dates, presentations and faculty presenters (for programs > 1 hour)
- A completed budget, indicating expenses and projected income from grant support or registration fees
- A list of planning committee members for all represented professions, along with completed disclosure forms, prior to credit being designated
- Documented needs assessments as appropriately aligned to the target audience/healthcare team
- 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)

CEPD reviews application and provides feedback within five (5) business days
- Duke ensures learning objectives and evaluation tools are aligned by target audience and profession and request current disclosures if needed
- Changes and modifications to the application may be requested at this time
- A designation letter will be issued when it is determined all criteria have been meet
- The following documents are emailed with the designation letter: Required Elements for Advertising, Syllabi, and/or Enduring Materials.

CEPD generates a Joint Providership Agreement for review and signature, if applicable
- This document describes the roles, responsibilities, and associated accreditation for the activity
- A designation letter will be issued subsequent to full execution of this agreement

Associate completes, signs, and returns the Joint Providership Agreement (if applicable)
- The following documents are emailed with the designation letter: Required Elements for Advertising, Syllabi, and/or Enduring Materials.

CEPD provides information on the process for submitting grant requests to potential funders, if requested
- Will be provided accreditation documentation to submit to funders along with all other needed details prior to grant submission, if requested
- CEPD must designate credit and review proposed grants before actual submission
- Grant agreements are submitted to Duke for legal review and approval
- CEPD 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 prior to acknowledgement in marketing materials and/or syllabus

Associate prepares and submits to CEPD draft marketing materials (save-the-date card, brochure, email announcement, website, etc)
- CEPD reviews (within 5 business days following receipt)

Rev 12/2017
Associate and CEPD work together to ensure all conflict of interests have been resolved

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

Associate prepares and submits 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

Following the CE activity, Client submits the following within 14 days

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