

OFFICE OF CONTINUING EDUCATION POLICIES

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AND PROCEDURES MANUAL

University of Florida College of Pharmacy Office of Continuing Pharmacy Education Mission and Goals

1. Office of Continuing Pharmacy Education Mission Statement:

The University of Florida College of Pharmacy Office of Continuing Pharmacy Education (CPE) provides high-quality, educational opportunities for Florida pharmacists to meet licensure requirements and improve their professional knowledge of patient-centered care in diverse practice settings.

2. Office of Continuing Pharmacy Education Goals:

- Identify and address the educational needs of pharmacists as related to providing medication therapy across diverse settings of care.
- Improve pharmacists' knowledge of pharmacy practice and patient-centered care;
- Provide continuing education programs that enable pharmacists to meet all state licensure requirements;
- Provide innovative continuing education programs in diverse and emerging practice areas (e.g., pharmacogenomics) to provide professional specialization and advancement opportunities for pharmacists.
- Provide live educational activities in an interactive format that encourages learner participation and facilitates improved learning and knowledge retention.
- Provide educational activities which are evidence-based and provides pharmacists with professionally accepted guidelines and standards of care.
- Provide educational activities that are fair-balanced and void of commercial influence.
- Cultivate partnerships with organizations offering targeted education where there is an unmet need.

Policy 1.0: Continuing Pharmacy Education Administration

The Continuing Pharmacy Education (CPE) Administrator, referred to herein as the Director of Continuing Pharmacy Education, at the University of Florida is responsible for the administration of the CPE Office and its compliance with Accreditation Council for Pharmacy Education (ACPE) standards, policies, and procedures. The person in this role is accountable for assuring and demonstrating that CPE Office policies and procedures meet and/or exceed ACPE standards and that all processes for developing, accrediting, offering, and evaluating CPE educational activities are consistently meet a standard of excellence and are compliant with or exceed educational standards outlined by the ACPE Policies and Procedures Manual: A Guide for ACPE-accredited Providers, see [Policy 1 Continuing Pharmacy Education Provider](#).

Per APE CPE Policies and Procedures, Section V, Policy 1.0, the CPE Administrator and other professional staff should maintain and enhance their professional development by seeking to improve knowledge, skills and experience in the responsibilities related to competency areas for CE professionals.

Administrators and other professional CE staff are to conduct an annual self-assessment of competencies to identify areas for continued development and growth. The CPE Director and administrators are expected to use conduct an annual self-assessment of the [National Learning Competencies](#) using the [CPD Professional Self-Assessment Worksheet annually](#), see Policy 1 to locate the self-assessment tool.

1. CPE Administrator Roles and Responsibilities

The Director of CPE at the University of Florida must be able to:

- Use evidence-based adult and organizational learning principles to improve the performance of healthcare professionals, healthcare teams and the organizations in which they work, in order to improve patient outcomes. (Using Adult/Organizational Learning Principles)
- Implement and improve independent, fair, balanced, and evidenced-based educational interventions that produce expected results for learners and the organizations in which they work. (Designing Educational Interventions)
- Use data to evaluate the effectiveness of CPE activities/interventions and the impact of the overall CPE program. (Measuring the Performance of CPE Activities and the Overall CPE Program)
- Collaborate and partner with stakeholders to help achieve CPE mission and goals. (Collaborating and Partnering with Stakeholders)
- Manage and administer the UF COP Office operations to meet personnel, finance, legal, logistical, accreditation, CPE credit, and/or regulatory standards. (Manage and Administer the CPE Program)
- Provide visionary leadership for the CPE program, including establishment of long- and short- term strategic planning, vision, and entrepreneurial goals to guide the global development and direction of the CPE Office. (Lead the CPE Program)
- Continually assess individual and CPE program performance and make improvements through relevant learning experiences. (Engage in Self-Assessment and Lifelong Learning)
- Approach the practice of CPE from a system-thinking perspective, recognizing that pharmacy professionals are part of a complex healthcare system that delivers patient care. (Engage in Systems Thinking in CPE).

2. Professional Development

The UF COP continually supports the professional development of all faculty and staff by supporting faculty and staff participation in trainings such as a) participation in ACPE Administrator workshops, national development meetings for Salesforce, and conferences on adult learning principles and b) completion of online software systems training and certification through the University of Florida (e.g., Canvas, Qualtrics, Wordpress) or external organizations (e.g., Salesforce).

3. CPE Office Administrative Changes

The following steps have been designed to assure a smooth and orderly transition in the event that a new CPE Administrator and/or office supervisor is appointed.

- The current CPE Administrator and/or supervisor must notify ACPE prior to his/her departure of a change in administration.
- The CPE administrator will receive training to ensure familiarity with the operations, procedures, and responsibilities of the UF COP CPE Office.
- The new CPE administrator will either attend an in-person ACPE Administrators' Workshop or complete the ACPE CPE Webinar Series within 30 days of his/her start date. This training will ensure familiarity with current ACPE standards, policy and procedures, general administrative, and other liaison responsibilities between the UF COP CPE Office and the ACPE.
- When a change in administrator, address or contact information occurs, the UF COP CPE Office will submit an online Provider Verification Form via the Provider Web Tool prior to the change taking place.
 - **Instructions for Updating the Provider Verification Form in Provider Web Tool in the Event of Administrative Changes**
 1. Login to the Provider Web Tool
 2. Click on the "Provider Verification Form"
 3. Click on "Make Changes"
 4. Enter the changes into the appropriate fields
 5. Click "Submit"

Policy 2.0: CPE Activities

The UF COP CPE Office will ensure all educational activities align with one of the three ACPE activity types: knowledge-based, application-based, or certificate program activities. Prior to accreditation, each educational activity will be reviewed by CPE Office faculty and categorized into one of the activity types based on the activity objectives, purpose, content, desired learning outcomes, and activity length. All accredited activities will align with the [UF COP CPE Office's mission and goals](#) and will meet the educational needs of pharmacists and/or pharmacy technicians. The UF COP CPE Office accredits and offers knowledge-, application-, and practice-based activities as outlined in the ACPE Policies and Procedures Manual: A Guide for ACPE-accredited Providers, see [Policy 2: CPE Activities](#), as well as [Standard 3: Continuing Pharmacy Education Activities](#) for full details and guidance from ACPE.

1. Types of CPE Activities

- **Knowledge-based CPE activity:**
 - These CPE activities are primarily constructed to transmit knowledge (e.g., facts).
 - The facts must be based on evidence as accepted in the literature by the health care professions.
 - The minimum amount of credit for these activities is 15 minutes or 0.25 contact hour.
- **Application-based CPE activity:**
 - These CPE activities are primarily constructed to apply the information learned in the time allotted.
 - The information must be based on evidence as accepted in the literature by the health care professions.
 - The minimum amount of credit for these activities is 60 minutes or one contact hour.
- **Certificate Program (previously named Practice-based CPE):**
 - These CPE activities are primarily constructed to instill, expand, or enhance practice competencies through systematic achievement of specified knowledge, skills, attitudes, and performance behaviors. The information within the certificate program must be based on evidence as accepted in the literature by the health care professions.
 - The formats of these CPE activities should include a didactic component (live and/or home study) and a practice experience component (designed to evaluate the skill or application)
 - The provider should employ an instructional design that is rationally sequenced, curricular based, and supportive of achievement of the stated professional competencies.
 - The minimum amount of credit for these activities is 15 contact hours.

Table 1: Overview of CPE Activity Types

Activity	Activity Purpose	Learning Assessment	Assessment Feedback
Knowledge (minimum 15 minutes)	Transit Knowledge	Questions/Recall of Facts	Must be provided to all participants
Application (minimum 60 minutes)	Apply Information	Case studies/application of principles	Must be provided to all participants
Certificate (minimum 15 hours)	Instill knowledge, skills, attitudes	Formative and summative	Must be provided to all participants

Policy 3.0: Joint Providers

1. Provision of Accreditation Services for Joint Provider Activities

The UF Office of Continuing Pharmacy Education (UF CPE) does not currently accredit jointly provided activities. However, in the event the jointly provided activities are accredited, the following policies will be used to govern these activities in accordance with the Accreditation Council for Pharmacy Education (ACPE) Policies and Procedures Manual, [see Policy 3.0 Joint Providership](#).

For any jointly provided activity, UF CPE will collaborate with the joint provider throughout the entire accreditation process and will provide a timeline for the submission of required ACPE program information based on the activity date.

For any jointly provided activities, UF CPE provides the following services:

- Guide CPE Activity Director and Program Faculty regarding ACPE requirements, teaching and learning strategies, and any other educational needs.
- Ensure all program materials meet accreditation standards outlined by ACPE.
- Provide a mechanism for program evaluation in compliance with ACPE standards.
- Document and provide a written summary of program evaluation data and feedback for program faculty and CPE Activity Director.
- Report credit and/or issue statements of credit as appropriate.
- Ensure that ACPE's Standards for Commercial Support are met (e.g., financial relationship disclosures, resolution of conflict of interest, disclosure of commercial support and relevant financial relationship to participants).

For any jointly provided activities, UF CPE retains the right to have input on, and final approval of, all of the following items:

- Activity title
- Gap analysis and needs assessment
- Learning objectives appropriate to pharmacists and/or pharmacy technicians
- Activity announcement literature (e.g., websites, brochures, flyers, email marketing)
- Activity format (e.g., live, home study, live and home study)
- Amount of CPE credit to be awarded
- Activity type (e.g., knowledge, application, or practice-based)
- Activity agenda
- Target audience designation (e.g., pharmacist and/or pharmacy technician)
- Program faculty
- Disclosures (e.g., planning committee, speakers, authors, content reviewers)
- CVs (e.g., planning committee, speakers, authors, content reviewers)
- Financial sponsors/grantors/commercial supporters
- Program planning process
- Educational materials (e.g., PowerPoint or other presentation materials/slides, monographs, handouts)
- Learning Assessment questions

The following timeline/deadlines apply to all Jointly Provided Activities:

- 90 days prior to the CPE Activity:

The joint provider must contact the UF CPE to request program planning material (e.g., faculty guidance, disclosure forms, list of ACPE requirements) and state their intent to work with the office to accredit its educational activity. UF CPE will provide a faculty guidance document, blank disclosure forms, and schedule a planning meeting with the joint provider.

- 60 days prior to the CPE Activity:

The joint provider must submit the following:

- Activity title
- Gap analysis and needs assessment
- Learning objectives appropriate to pharmacists and/or pharmacy technicians
- Activity announcement literature (e.g., websites, brochures, flyers, email marketing)
- Activity format (e.g., live, home study, live and home study)
- Activity Agenda
- Target audience designation (e.g., pharmacist and/or pharmacy technician)
- List of program faculty and program planning committee, including each individual's degree, credentials, organization and job title
- Disclosures (e.g., planning committee, speakers, authors, content reviewers)
- CVs (e.g., planning committee, speakers, authors, content reviewers)
- List of financial sponsors/grantors/commercial supporters
- Activity budget
- Program planning process

Based on this information, UF CPE will determine the activity type (e.g., knowledge, application, practice) and the amount of CPE credit to be awarded.

UF CPE will review the required information to ensure compliance with ACPE requirements and provide feedback to the Joint Provider within 15 days of submission. Any requested revisions must be submitted to UF CPE within 10 days of receipt of the request.

UF CPE will grant conditional approval to jointly-provided educational activities upon receipt of all required documentation. Final approval will occur once the educational materials and active learning questions are peer-reviewed by UF COP faculty (see below) and any requested revisions are completed.

- 21 days prior to the CPE Activity:

The joint provider must submit the following:

- Educational materials (e.g., PowerPoint or other presentation materials/slides, monographs, handouts)
- Active learning questions (must be appropriate based on the activity type)
- Any program changes that occurred since original submission

UF CPE faculty will review the educational materials and active learning assessments to ensure material is educationally sound and based on current literature. The assessment questions will be reviewed to make sure they meet the requirements of the program's activity type. If revisions are requested, the joint provider must re-submit within 10 days for the activity to be eligible for accreditation.

UF CPE will grant final approval to jointly provided educational activities after receipt of all

required documentation and verification of compliance with ACPE standards.

The following will be provided to the joint provider upon UF CPE approval:

- Universal Activity Number
- Hyperlink to program evaluation
- CPE Credit reporting information and instructions

Credit Reporting Information

- UF CPE Office will report CPE credit for participants who sign in and complete the online program evaluation.
- UF CPE will report CPE credit to CPE Monitor and CE Broker, as applicable. Paper statements of CPE credit can be printed from the participant's NABP e-profile.
- A credit reporting fee will be applied, even if credit is not reported due to the pharmacist, technician, or activity director providing incorrect information (e.g., license number(s), DOB).
- Participants will be notified that all pharmacists and pharmacy technicians should maintain their own license and/or certification and it is their responsibility to follow up with UF CPE regarding credit discrepancies.
- UF CPE reserves the right to award or deny credit to a late-claiming participant (e.g., ≥ 60 days after participation in the CPE activity).
- UF CPE reserves the right to request access to CPE Monitor[®] if the activity in question occurred within the previous 6 months and with an appropriate reason for access, i.e. power outage, etc.
- Participants should contact UF CPE with any questions or credit reporting discrepancies.

- 15 days after the CPE Activity

The Joint Provider must submit a sign-in sheet verifying individual attendance. Once the sign-in sheet is received, the CPE office will close the evaluation, report CPE credit, aggregate program and speaker evaluation data, and communicate the evaluation summary to the Program Faculty and Joint Provider. The final budget must also be submitted if financial support is provided for the activity.

UF CPE will report credit for participants who sign in and complete the online program evaluation. UF CPE will contact the individual and Joint Provider regarding reporting errors to request accurate CPE reporting information. Upon request, participants have 7 days to submit accurate reporting information.

- 45 days after the CPE Activity

UF CPE will review any credit reporting errors and make a final attempt to contact the individual and/or Joint Provider to obtain accurate data and correct reporting errors. Upon request, participants have 5 days to submit the accurate reporting information.

Policy 4.0: Activity Announcement Literature

Adequate advance information should be provided to prospective learners in order to enable them to be well informed regarding CPE activities. UF COP CPE Office achieves this through by requiring standardized educational Activity Announcements be made available to potential learners in a timely manner during the CPE Activity Planning Process. The UF COP CPE follows the guidelines for the development of [CPE Activity Announcement Literature as outlined in Policy 4](#) of the ACPE Policies and Procedures Manual. A review of all activity announcement literature is completed to ensure compliance with these requirements using the Activity Review Checklist/Rubric, **See Appendix 1: Activity Announcement Checklist.**

1. General Activity Material Requirements

Materials that offer the opportunity to participate, purchase, or register for a CPE activity must include the following informational items:

- The learning objectives;
- The type of activity, i.e., knowledge, application, practice;
- The target audience(s) that may best benefit from the activity;
- The fees for the activity;
- The schedule of the educational activities;
- The amount of CPE credit, specified in contact hours or CEUs;
- The official ACPE logo, used in conjunction with a statement identifying the accredited provider(s) sponsoring or joint providing the activity, according to the exact language of the prescribed statement:
 - “The University of Florida is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education.”
- The ACPE Universal Activity Number assigned to the activity;
- The appropriate target audience designation (‘P’ and/or ‘T’);
- A full description of all requirements established by the provider for successful completion of the CPE activity and subsequent awarding of credit (e.g., passing a post-test at a specified proficiency level, completing an activity evaluation form, participating in all sessions or certain combinations of sessions which have been designed as a program package, etc.);
- Acknowledgment of any organization(s) providing financial support for any component of the educational activity; and,
- For home study activities: the initial release date and the expiration date.

2. Requirements for Online Activity Announcements

In addition to the informational items listed above, promotional materials for Internet-based CPE activities should clearly and explicitly specify the following, with the exception of local or restricted communication networks (i.e., intranet) Activity announcements displayed on the Internet must include all of the required elements outlined in the activity announcement materials, as well as the following:

- **Hardware requirements:** The minimum hardware requirements including the minimum memory, storage, processor speed, and multimedia components required by the learner;
- **Software requirements:** The minimum software requirements including, where appropriate, the Internet Browser(s) and minimum version along with any Browser “Plug-Ins” that may be required;
- **Internet:** The Internet connectivity and minimum connection speed the learner must have;
- **Provider Contact Information:** The accredited provider must have a mechanism in place for the learner to be able to contact the provider if there are questions about the Internet CPE activity;

- **Policy on Privacy and Confidentiality:** The accredited provider must have, adhere to, and inform the learner about its policy on privacy and confidentiality that relates to the CPE activities it provides on the Internet; and
- **Copyright:** The UF COP Office must be able to document that it owns the copyright for, or is licensed or has received permissions for use of, or is otherwise permitted to use copyrighted materials within any CPE activity.

3. Requirements for Multi-Day Conference Announcements

Activity announcements for multi-day conferences must include the following:

- The learning objectives of the overall conference;
- The target audience(s) that may best benefit from the conference;
- The fees for the conference;
- The schedule of the educational activities;
- The amount of CPE credit, specified in contact hours or CEUs;
- The official ACPE logo, used in conjunction with a statement identifying the accredited provider(s) sponsoring or joint providing the activity, according to the exact language of the prescribed statement:
 - “The University of Florida is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education.”
- The ACPE Universal Activity Numbers assigned to the activities;
- The appropriate target audience designation (‘P’ and/or ‘T’);
- A full description of all requirements established by the provider for successful completion of the CPE activities within the conference and subsequent awarding of credit (e.g., passing a post-test at a specified proficiency level, completing an activity evaluation form, participating in all sessions or certain combinations of sessions which have been designed as a program package, etc.); and,
- Acknowledgment of any organization(s) providing financial support for any component of the educational activity.

4. Requirements for Final Conference Materials

In addition to complete conference and ACPE Accreditation information, final conference materials for live conferences must include the following information for each educational session:

- The faculty member(s) name, degree, and title/position;
- The faculty member’s disclosures; and,
- The learning objectives of the activities.
- The type(s) of activities offered at the conference, i.e. knowledge, application, practice.

5. Additional Requirements for Announcement Materials

This policy does not apply to materials such as a ‘teaser,’ save-the date cards, advertisements post cards, etc. that are intended to alert learners about an upcoming CPE activity. For these materials, the UF COP CPE Office may use the ACPE logo and provider statement as indicated above, but cannot include any language alluding to or indicating that the Office has applied for ACPE credit. Instead, the following language may be used: “This activity is eligible for ACPE credit; see final CPE activity announcement for specific details.”

Policy 5.0: Continuing Education Credit

The UF COP Office must review each activity to ensure the number of contact hours of CEUs offered are appropriate based on the activity type (knowledge-based, application-based, or certificate program) identified in the educational material.

1. Activity Types and Amount of CPE Credit

The UF COP CPE Office has adopted ACPE's definitions of activity types and minimum number of credit hour requirements (For additional information about requirements for different activity types, see Policy 2.0).

- **Knowledge-based CPE activity:** The minimum credit for these activities is 15 minutes or 0.25 contact hour.
- **Application-based CPE activity:** The minimum credit for these activities is 60 minutes or one contact hour.
- **Certificate Program:** The minimum credit for these activities is 15 contact hours.

2. Amount of Credit Awarded for CPE Activities

- Credit awarded for live CPE activities is based on the amount of time the educational activities takes from start to finish. The amount of CPE credit awarded for live CPE activities is based on real-time calculations. For example, a 60-minute live CPE activity equates to 1.0 contact hours (0.1 CEU).
- Credit awarded for home-study CPE activities is based on the amount of time the educational activity will take from start to finish. Whenever possible, home-study activities are piloted prior to launch to collect data on time required to complete each activity. In addition, as part of the evaluation process, learners are asked how long it took them to complete the CPE activity. These data are audited periodically to ensure alignment with CPE credit assignment and time to complete educational activity. If discrepancies are noted in either of these processes, the UF COP CPE Office reserves the right to require revision of the CPE activity or adjustment of credits awarded.

3. Review of Live CPE Activity Content

CPE faculty will review educational content (e.g., presentation slides) for all live CPE activities to ensure the intended content is evidence based and appropriate for the activity type, among other criteria. CPE Activity content may need to be revised based on the findings of the review process. The UF COP CPE Office reserves the right to request changes and/or deny accreditation approval to live CPE activities if the educational content does not meet UF COP CPE Office Standards.

This review process is documented via the Slide Review Checklist/Rubric (**Appendix 2: Education Slide Review Criteria**).

4. Review of Home-Study CPE Activity Content

All home-study content will be peer-reviewed by CPE faculty and/or external reviewers to ensure the educational material is appropriate for the proposed activity, is based on current medical evidence, uses adult learning principles, and is of a length consistent with the number of CPE credit hours awarded. Pharmacy faculty and/or pharmacy technician reviewers, in conjunction with the UF COP CPE Office, reserve the right to request changes and/or deny accreditation approval to home-study CPE activities if the educational content does not meet UF COP CPE Office Standards.

5. Awarding Partial CPE Credit

Partial CPE credit will not be provided. A Universal Activity Number (UAN) is assigned to each CPE activity, and learners will only receive full credit for successful completion of the entire CPE activity, or no credit for non-completion. The assignment of the UAN will be differentiated to accurately reflect the CPE activity type to ensure accuracy of the topic designator, and simplify issuing the credit.

Policy 6.0: Record Keeping

The UF COP CPE Office maintains and assures the availability of records adequate to serve the needs of learners and others requiring such information for a minimum of six years. All CPE documentation and learner data are maintained electronically and stored in Salesforce and/or electronic file-sharing systems.

1. Maintenance and Storage of CPE Activity Information

The following CPE Activity data are maintained electronically in Salesforce for a minimum of 6 years and indexed by Activity Name and Universal Activity Number.

- Activity Name
- Universal Activity Number (UAN)
- CE Broker Number
- Event Date, if applicable
- UAN Expiration Date
- Fee
- Target Audience
- CPE Hours Awarded
- Activity Type
- Format (Live or home-study)
- Location, if applicable

2. Maintenance and Storage of CPE Activity Supporting Documents

The following supporting documents are compiled in an electronic file-sharing system during the activity planning process and uploaded into Salesforce when the CPE Activity is approved.

Supporting documents are indexed in Salesforce by Activity Name and Universal Activity Number. As a backup measure, all supporting document files are also retained in the electronic file-sharing system for a minimum of six years.

- Completed CPE Activity Planning Form
- Needs assessment
- Objectives
- Disclosure form
- Presenter/Faculty CVs
- Planning process
- Activity announcement
- Slides and review document
- Activity Description Form from the Provider Web Tool
- Program evaluation data
- Attendance records (sign-in sheets)

Policy 7.0: Awarding CPE Credit

The UF COP CPE Office submits all activity and participant information online via CPE Monitor within 21 days of the activity using the activity's Universal Activity Number. To report credit, the UF COP CPE Office collects the participant's NABP e-profile ID number, month and date of birth, and date of activity participation during the registration process and in the online program evaluation (as backup), which is also linked to the Universal Activity Number. CPE credit information is available in the pharmacist's NABP e-profile after credits have been processed by ACPE and NABP.

1. Awarding Credit for Live CPE Activities

Attendance Verification

- To receive credit for live CPE activities, complete an online activity evaluation hosted in the FormAssembly, and meet any other activity-specific requirements (e.g., demonstration of skill, achievement of passing score on a post-test). All such requirements must be included in the CPE activity announcement.
- For online live webinars, learners are required to document attendance through submission of a session-specific attendance code with their activity evaluation form and participation in online active learning activities (e.g., polls, submitting response to patient case challenges).
- CPE staff identify learners who have met all requirements for the live CPE activity and also complete the online activity evaluation. CPE Credit is awarded to those individuals who complete all of these steps.

Collection of Learner Data

- Once the live program is completed, a link to the online activity evaluation (**Appendix 3: Evaluation Questions**) is emailed to learners who were in attendance. The activity evaluation (administered via FormAssembly software) must be completed within 15 days of the CPE Activity.
- All data required for credit reporting are collected via the online activity evaluation, including the participant's month and date of birth (MMDD), NABP number, and participation date. Participant-specific evaluation data are linked electronically to the CPE Activity Name and ACPE UAN number for CPE Monitor Reporting.

Administrative Coordination of Credit Reporting

- At 15 days post-activity, an internal electronic alert linked to the UAN fires in Salesforce to prompt CPE staff to close the online activity evaluation.
- Within 7 days of closing the online activity evaluation, CPE staff report credit to CPE Monitor and conduct any needed follow-up with participants to resolve reporting errors (i.e., incorrect NABP or DOB).
 - Participants with reporting errors are notified that the UF COP CE Office has 60 days to report credit to NABP and that it is the participant's responsibility to ensure the correct information is provided within the 60-day period. Participants are encouraged to provide this information within 7 to 10 days.

2. Awarding Credit for Home-Study CPE Activities

- Activity registration and CPE credit reporting for home-study activities is automatically coordinated through interface among QuickReg (home-study course registration software), Canvas (online learning management system), Salesforce, and CPE Monitor.
- Participants register for home-study courses in QuickReg, at which time the participant provides

his/her NABP number, month/day of birth (MMDD), and other required information. Each registration is linked to the participant information and the specific UAN number for that activity.

- Once participants are registered, QuickReg communicates activity registration data to Salesforce, which allows CPE staff to track activity enrollment and document all learner communications.
- Learners access home-study activity content via Canvas (online learning management system). Canvas provides learners with access to activity contents, instructions for completion, and tracks student progression through the activity.
- Once the home-study activity is successfully completed, it is documented in Canvas, and communicated electronically to Salesforce and QuickReg. Within 24 hours, QuickReg submits required participant completion information to CPE Monitor for credit reporting.
- Once credit reporting is complete, an automatic email is generated from Salesforce to the participant providing confirmation. If a credit reporting error occurs, the UF COP CPE Office contacts the participant to resolve the error as described for live CPE activities above.

3. Technical Specifications Guide for CPE Monitor

The UF COP CPE Office relies on the [Technical Specifications Guide](#) to assist in the upload process for participant information.

4. Statements of CPE Credit

All statements of credit issued by UF COP CPE Office must include the following informational items.

- The name of the learner;
- The title and date(s) of the activity;
- Type of activity: knowledge, application, or certificate program;
- The appropriate target audience designation (“P” or “T”)
 - Separate statements of credit must be issued to either pharmacists or pharmacy technicians
 - If non-pharmacist attends the activity, a statement of credit with a “P” designation should be issued;
- The accredited provider sponsoring or joint providing the activity;
- The official ACPE logo;
- The amount of credit awarded;
- The assigned ACPE Universal Activity Number;
- The date the CPE Administrator signed the original statement of credit (either hand-written or electronically generated).

The UF COP Office will not to use the term “certify” or “certification” on its statements of credit to prevent any confusion with certification processes.

5. Statements of Credit for Non-U.S. licensed Pharmacists and Pharmacy technicians and/or Health Care Professionals Other than Pharmacists/Pharmacy Technicians

Statements of Credit for Non-U.S. licensed Pharmacists and Pharmacy Technicians and/or Health Care Professionals Other than Pharmacists/Pharmacy Technicians For non-U.S. licensed pharmacists and pharmacy technicians and/or other health care professionals, the provider shall give evidence to each learner, in the form of a statement of credit of successful completion of the CPE activity within 60 days of participation in the CPE activity. Completed and signed statements of credit are distributed only following the completion of the activity within the time frame stated by the provider (e.g., on promotional materials). Incomplete or blank statements of credit must not be distributed.

6. Administrative Warning

The UF COP CPE Office understands that it will be placed on Administrative Warning, probation or an adverse action, defined as withdrawal, denial or removal of accreditation may be taken if the UF COP CPE Office fails to submit an activity and/or enter participant information online via CPE Monitor.

7. Awarding Late Credit

All pharmacists and pharmacy technicians maintain their own license and/or certification and it is their responsibility to follow up with the provider if any CPE credit discrepancies are found. The UF COP CPE Office has implemented multiple checks and balances to ensure credit is reported on time. If a credit discrepancy or other error occurs, UF COP CPE office will take all possible steps to award credit to a late-claiming participant (i.e., more than 60 days after CPE activity). If the credit discrepancy is due to participant error, participants will be charged a fee to claim late credit. If the discrepancy is due to a UF COP CPE office error, credit will be reported at no charge to the participant. The UF COP CE may request access to CPE Monitor® if the activity in question occurred within the previous 6 months and with an appropriate reason for access, i.e., power outage, etc.

UF COP CPE understands the process to request CPE Monitor to upload late ACPE credit and that the office will incur a late fee as outlined below:

If the UF COP CPE Offices requests access to CPE Monitor® to upload late ACPE credit will incur a late fee as follows and outlined in ACPE Continuing Pharmacy Education Provider Accreditation Program Policies and Procedures Manual: A Guide for ACPE Accredited Providers [Policy 7.0 Awarding Credit](#):

- The first three (3) requests: UF COP CPE Office will receive a waiver and will be provided with education and guidance.
- Upon the fourth request and thereafter, the UF COP CPE Office understands it will incur a late fee
- If a UF COP CPE Office requires both a retroactive ADF change in the Provider Web Tool and override to amend a credit, only the ADF change fee will be charged. The UF COP CPE Office will not be charged twice.
- The UF COP CPE Office will be given five (5) business days to submit late credits to CPE Monitor® to allow time to rectify credit information if needed.
- The UF COP CPE Office will be required to fill out the CPE Monitor® Post-60 Day Credit Request Form in order to request an override:
 - Once a user submits this form, an email will be sent to the current CPE Administrator who is listed in the Provider Web Tool. Once the CPE Administrator submits the associated fee, ACPE staff will implement this request and the provider will be notified. This request cannot be granted unless payment is received.
 - This automatic form will allow for tracking of override data, managing the number of override requests given to each provider, and application of fees.
- The UF COP CPE Office will charge a fee to participants wanting to claim late credit as outlined in the [UF COP CPE Credit Reporting Policy](#). This is a business decision that is entirely up to the provider to implement a fee policy for late credit. ACPE does not have a policy denying the ability to charge participants attempting to claim late credit.
- For all CPE Monitor® and Provider Web Tool related questions, overrides, or additional information, providers may contact ceinfo@acpe-accredit.org or cpemonitor@acpe-accredit.org.

Policy 8.0: Financial Resources

UF COP CPE Office budget and resources shall be adequate to sustain the activities undertaken and their continued improvement, the maintenance and security of records of CPE activities and statements of credit, and for the training and professional development of the CPE administrator and the provider's staff.

To ensure this, the UF COP CPE Office conducts monthly and annual audits of income and expenses in conjunction with UF COP Fiscal Services. This auditing process includes review of global income and expense measures as well as more granular data, such as income and expenses for each CPE activity or income by type, format, or target audience of the CPE activity. These data inform long-term financial sustainability for the office as a whole and also enable the Office to incorporate sustainability into short- and long-term strategic planning. The UF COP CPE Office reports sustainability data along with any recommendations for needed changes to COP leadership on an annual basis, or more often as needed.

Policy 9.0: Provider Web Tool

The UF COP CPE Office will adhere to all the governing rules outlined in [Policy 9.0 Provider Web Tool](#) and as outlined below.

1. Change in Administrator

Policy 1.0: Continuing Pharmacy Education Administration summarizes procedures to ensure appropriate steps are taken in the event of a change in administrator, address, or contact information for UF COP CPE Office.

2. Accreditation Certificate

The UF COP CPE Office is aware of the process to print its Certificate of ACPE Accreditation via the [Provider Web Tool](#) and selecting the “Print Accreditation Certificate.”

3. Activity Description Form

UF COP CPE Office submits an Activity Description Form via the Provider Web Tool prior to the initial date of an activity. The following information is entered into the Provider Web Tool at submission:

- Release year
- Sequence number
- Learner designation (Pharmacists – P or Pharmacy Technicians – T)
- Title of the activity
- Learning objectives
- Topic designator (see below)
- Contact hours or Continuing Education Units (CEUs)
- Release and expiration dates
- Joint Providership information (N/A)
- Regulatory and Re-certification CE requirements
- Live dates/locations for live activities
- Format
- Home study format
- Receipt of grant support

Activity Description Forms are retained in Salesforce, linked to other required documentation by individual activity, and accessible at all times as needed. All CPE activities are required to undergo peer review to receive a UAN. For activities accredited for more than one year, the UF COP CPE Office conducts peer review of activity materials at least once every two years or more frequently if indicated by new scientific developments. If it is desired to continue an activity beyond its UAN expiration date, UF COP CPE Office facilitates a thorough review of program content, active learning activities, assessment questions, and all other materials to verify that they are accurate and up to date and make revisions if needed. Once the peer-review and revision processes are completed, a new UAN and expiration date can be assigned to the activity.

4. Universal Activity Numbers

CPE activities that meet UF COP CPE Office criteria for approval are entered into the Provider Web Tool to generate a single and unique Universal Activity Number (UAN). A Universal Activity Number (UAN) is an identification number that is assigned to each CPE activity developed and provided, or joint provided, by an ACPE-accredited provider. This number is developed by appending to the ACPE

provider identification number (e.g., 0197), the joint provider designation number (0000 for no joint provider, 9999 for all joint providers), the year of the CPE activity development (e.g., 22), the sequential number of the CPE activity from among the new CPE activities developed during that year (e.g., 001), and the topic and format designators (see below).

The UAN number is developed as follows:

- **Provider Number (0012):** The first four digits indicate the UF COP CPE Office ACPE provider number
- **Joint Provider Designations:**
 - 0000 – no joint providership
 - 9999 – joint providership with an organization
- **Calendar Year:** The third set of digits indicates the calendar year in which the activity is released.
- **Sequence Number (0001 – 9999):** The fourth set of digits is the sequential number order in which the activity was submitted for that particular calendar year.
- **Format Designators:**
 - L - Live activities
 - H - Home study and other mediated activities
 - B – Both for Certificate Programs
- **Topic Designator:** The Topic Designator is the last 2 digits of the Universal Activity Number and is assigned as follows:
 - **01: Disease State Management/Drug Therapy**
 - **02: AIDS Therapy**
 - **03: Law (related to pharmacy practice)**
 - **04: Pharmacy Administration**
 - **05: Patient Safety**
 - **06: Immunizations**
 - **07: Compounding**
 - **08: Pain Management/Opioids**
 - **99: Additional Topic Area**
- **Target Audience Designator:**
 - If a CPE activity’s target audience is exclusively for **pharmacists** the designation, “P” is used.
 - **01-P Disease State Management/Drug therapy** – Activities that address drugs, drug therapy, and/or disease states.
 - **02-P HIV/AIDS therapy** – Activities that address therapeutic, legal, social, ethical, or psychological issues related to the understanding and treatment of patients with HIV/AIDS
 - **03-P Law** – Activities that address federal, state, or local laws and/or regulations affecting the practice of pharmacy.
 - **04-P Pharmacy Administration** - Activities that address topics relevant to the practice of pharmacy that include the economic, social, administrative and managerial aspects of pharmacy practice and health care.
 - **05-P Patient Safety** - Activities that address topics relevant to the prevention of healthcare errors and the elimination or mitigation of patient injury caused by healthcare errors.
 - **06-P Immunizations** - Activities related to the provision of immunizations, i.e., recommend immunization schedules, administration procedures, proper storage

and disposal, and record keeping. This also includes review for appropriateness or contraindication and identifying and reporting adverse drug events and providing necessary first aid.

- **07-P Compounding** - Activities related to sterile, nonsterile, and hazardous drug compounding for humans and animals. This includes best practice and USP quality assurance standards, environmental testing and control, record keeping, error detection and reporting, and continuous quality improvement processes.
 - **08-P Pain Management/Opioids** - Activities that address any component regarding the treatment and management of pain, including the prescribing, distribution and use of opioid medications, and/or the risks, symptoms, and treatment of opioid misuse/addiction.
 - **99: Additional Topic Areas** – activities related to topics relevant to the practice of pharmacy not included in the classifications of the topic designators 01-08.
- If a CPE activity’s target audience is exclusively for **pharmacy technicians** the designation, “T” is used.
- **01-P Disease State Management/Drug therapy** – Activities that address drugs, drug therapy, and/or disease states.
 - **02-P HIV/AIDS therapy** – Activities that address therapeutic, legal, social, ethical, or psychological issues related to the understanding and treatment of patients with HIV/AIDS
 - **03-P Law** – Activities that address federal, state, or local laws and/or regulations affecting the practice of pharmacy.
 - **04-P Pharmacy Administration** - Activities that address topics relevant to the practice of pharmacy that include the economic, social, administrative and managerial aspects of pharmacy practice and health care.
 - **05-P Patient Safety** - Activities that address topics relevant to the prevention of healthcare errors and the elimination or mitigation of patient injury caused by healthcare errors.
 - **06-P Immunizations** - Activities related to the provision of immunizations, i.e., recommend immunization schedules, administration procedures, proper storage and disposal, and record keeping. This also includes review for appropriateness or contraindication and identifying and reporting adverse drug events and providing necessary first aid.
 - **07-P Compounding** - Activities related to sterile, nonsterile, and hazardous drug compounding for humans and animals. This includes best practices and USP quality assurance standards, environmental testing and control, record keeping, error detection and reporting, and continuous quality improvement processes.
 - **08-P Pain Management/Opioids** - Activities that address any component regarding the treatment and management of pain, including the prescribing, distribution and use of opioid medications, and/or the risks, symptoms, and treatment of opioid misuse/addiction.
 - **99: Additional Topic Areas** – activities related to topics relevant to the practice of pharmacy
- Note: If the CPE activity is intended for both pharmacists and pharmacy technicians, that activity will have the same Universal Activity Number with respect to the provider identification number, joint provider designation, year of release, sequence number, format and topic designator; however, the target audience designator in the number will be specific to each audience, either a “P” or “T.” For example:

0197-0000-17-001-L05-P (activity number for pharmacists)

0197-0000-17-001-L05-T (activity number for pharmacy technicians)

5. Certificate Program Numbers

A Certificate Program Number (CPN) is an identification number that is assigned to each Certificate Program developed and provided by an ACPE-accredited provider. This number is developed by appending to the ACPE provider identification number (e.g., 0197), the year of the Certificate Program development (e.g., 22), and the sequential number of the Certificate Program from among the new CPE activities developed during that year (e.g., 001). Example: 0197-22-001-CP. 9f. Late Activity Description Form Policy ACPE will assess late fees for assisting in changes to an Activity Description Form and/or assistance with an Activity Description Form never submitted through the Provider Web Tool after the activity has occurred. ACPE will charge a fee per activity to assist with changes. Payment will need to be received in advance of any changes.

6. Late Activity Description Form Policy

The UF COP CPE OFFICE understands the ACPE will assess late fees for assisting in changes to an Activity Description Form and/or assistance with an Activity Description Form never submitted through the Provider Web Tool after the activity has occurred. ACPE will charge a fee per activity to assist with changes. Payment will need to be received in advance of any changes.

Changes include, but not limited to: Credit hour changes, title modifications, release/expiration date, type of activity, typos, sequence number, topic designator, joint providership information, adding additional format and backdating activity information.

Policy 10.0: Fees

The UF COP CPE Office pays an annual fee to ACPE to defray operational costs in accordance with the Board's non-profit corporate status as outlined in [Policy 10 Fees](#). The fee schedule is posted on ACPE's website and is accessible to providers at all times. A provider's annual fee is assessed based on the number of activities offered, the number of CEUs allocated to each activity, and the number of learners. Providers will be placed in one of five fee levels determined by the number of Educational Service Units the provider offered over the course of the year (assessed electronically by the Annual Activity report in CPE Monitor™).

Fees are subject to change at any time throughout the year. The Board may adjust the fees, set effective dates for such adjustments at any regular or special meeting; provided however, no change in fees shall become effective no less than thirty (30) days following written notice by ACPE to all accredited providers.

Policy 11.0: Organization Name Change or Merger

If the UF COP CPE Office undergoes a name change or merger, it will submit legal documentation of the change in the form of an amendment to the articles of incorporation or other legal documentation to ACPE for confirmation and update of ACPE records.

Policy 12.0: Substantive Changes

The UF COP CPE Office adheres to ACPE's policies and procedures for reporting substantive changes as outlined in Policy 12 Substantive Change Policy.

1. Procedures for Reporting Substantive Change

The UF COP Office will notify the ACPE of a change of the CPE administrator or change in supervisor, via the Provider Verification Form in the Provider Web Tool. For other substantive changes, the UF COP Office will notify ACPE in writing within 30 days of the change.

Notification to ACPE will provide documentation that the program will continue to comply with standards.

2. Non-Compliance with Substantive Change Reporting

The UF COP CPE Office understands that it has responsibility as an accredited provider to follow the Substantive Change policies and procedures of ACPE and to inform ACPE of such changes in accord with those procedures. The UF COP CPE Office understands that if it fails to follow this substantive change policy and its procedures, the accreditation of the program may be placed in jeopardy.

Policy 13: Grievances

Grievances regarding activity fees, continuing education credit, course content, personnel or other matters related to CPE activities will be brought to the attention of the Director of Continuing Pharmacy Education. Every attempt, within the UF COP CPE Office's policies and procedures, will be made to satisfy the complainant.

Policy 14: Refunds

The UF COP CPE Office will utilize fair and equitable policies related to refund, transfer, and extension of courses. Refund policies may differ depending on the type, length, format, and other characteristics of individual CPE activities. Refund policies and instructions for submitting refund requests electronically are available online for each activity on the UF COP CPE Office website. Requests for refunds are reviewed on a weekly basis and responded to individually as appropriate. See the UF COP CPE Office [Refund, Transfer, and Extension Policy](#) to review the policy in full.

Policy 15.0: Standards for Integrity and Independence in Accredited Continuing Education

The UF COP CPE Office must ensure that all elements of activity planning are conducted independently of a commercial interest and that the educational content is presented with full disclosure and equitable balance. Educational topics and learning activities must be distinguished from topics and learning activities that are promotional or appear to be intended for the purpose of endorsing a specific commercial drug, device or other commercial product or service. The UF COP CPE Office adheres to these standards to ensure the integrity of its continuing education programs as outlined in [Standard 5: Standards for Integrity and Independence in Accredited Continuing Education](#).

The Standards for Integrity and Independence in Accredited Continuing Education reflects the values of the continuing education community and have been adopted by six accrediting bodies representing health professions.

- Accreditation Council for Continuing Medication Education (ACCME)
- Accreditation Council for Pharmacy Education (ACPE)
- American Academy of Family Physicians (AAFP)
- American Nurses Credentialing Center (ANCC)
- Association of Regulatory Boards of Optometry's Council on Optometric Practitioner Education (ARBO/COPE)
- Joint Accreditation for Interprofessional Continuing Education

The Standards, as outlined in Standard for Integrity and Independence in Accredited Continuing Education, are designed to:

- Ensure the accredited continuing education serves the needs of patients and the public.
- Present learners with only accurate, balanced, scientifically justified recommendations.
- Assure healthcare professionals and teams that they can trust accredited continuing education to help them deliver safe, effective, cost-effective, compassionate care that is based on best practice and evidence.
- Create a clear, unbridgeable separation between accredited continuing education and marketing sales.

1. Eligibility

In accordance with the APCE, the UF COPE is committed to ensuring that accredited continuing education (1) presents learners with only accurate balanced, scientifically justified recommendations, and (2) protects learners from promotion, marketing, and commercial bias. The UF COPE CPE will follow the guidance established by ACPE which outlines the types of organizations that may be eligible to be accredited. For more information, visit the Standards for Integrity and Independence in Accredited Continuing Education, see [Eligibility FAQ](#), on the UF COP CPE Faculty Guidance page.

The UF COP CPE is committed to ensuring all recommendations for patient care in accredited continuing education is be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options. Any and all accredited education related to patient care is required to conform to the general accepted standards of patient care. To ensure this practice, all educational content is peer reviewed and required to include a citation stating where the evidence cited originated.

Ensuring that this standard is met is incorporated into all layers of the planning and development process. The UF COP CPE directs all faculty to our Faculty and Guidance for Developing Continuing Education

Programs page, specifically the [Content Validation Statement](#) to learn more about this educational requirement. The UF COP CPE developed this [Peer Review](#) document in 2022 to use as a tool to review all new continuing education programs to ensure it meets this criterion.

Types of Organizations That May Be Accredited by ACPE

Organizations eligible to be accredited (*eligible organizations*) are those whose mission and function are:

- providing clinical services directly to patients; or
- the education of healthcare
- professionals; or
- serving as fiduciary to patients, the public, or population health; and other
- organizations that are not otherwise ineligible. Examples of such organizations include:
 - Ambulatory procedure centers
 - Blood banks
 - Diagnostic labs that do not sell proprietary products
 - Electronic health records companies
 - Government or military agencies
 - Group medical practices
 - Health law firms
 - Health profession membership organizations
 - Hospitals or healthcare delivery systems
 - Infusion centers
 - Insurance or managed care companies
 - Nursing homes
 - Pharmacies that do not manufacture proprietary compounds
 - Publishing or education companies
 - Rehabilitation centers
 - Schools of medicine or health science universities
 - Software or game developers

Types of Organizations That Cannot Be Accredited by ACPE

Companies that are ineligible to be accredited (*ineligible companies*) are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. Examples of such organizations include:

- Advertising, marketing, or communication firms whose clients are ineligible companies
- Bio-medical startups that have begun a governmental regulatory approval process
- Compounding pharmacies that manufacture proprietary compounds
- Device manufacturers or distributors
- Diagnostic labs that sell proprietary products
- Growers, distributors, manufacturers or sellers of medical foods and dietary supplements
- Manufacturers of health-related wearable products
- Pharmaceutical companies or distributors
- Pharmacy benefit managers
- Reagent manufacturers or sellers

Owners and Employees of Ineligible Companies

- The owners and employees of ineligible companies are considered to have unresolvable financial relationships and must be excluded from participating as planners or faculty, and must not be allowed to influence or control any aspect of the planning, delivery, or evaluation of accredited continuing education, except in the limited circumstances outlined in Guideline 3.2.

- Owners and employees are individuals who have a legal duty to act in the company's best interests.
- Owners are defined as individuals who have ownership interest in a company, except for stockholders of publicly traded companies, or holders of shares through a pension or mutual fund.
- Employees are defined as individuals hired to work for another person or business (the employer) for compensation and who are subject to the employer's direction as to the details of how to perform the job.

Presenters shall adhere to the following guidelines outlined in this policy to ensure Standards for Integrity and Independence in Accredited Continuing Education are met.

Guideline 1: Ensure Content is Valid

Guideline applies to all accredited continuing education

As an accredited provider, the UF COP CPE Office, is responsible for ensuring its continuing education programs are fair and balanced and that any clinical content presented supports, safe effective care, and is evidence-based as outlined in the most recent literature.

- All recommendations for patient care **must be** based on current science, evidence, and clinical reasoning while giving a fair and balanced view of diagnostic therapeutic options.
- All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.
- Any educational content that discusses, debates, and/or explores new, evolving and emerging topics must be clearly identified during the educational program and individual presentation. It is the responsibility of the UF COP CPE Office to facilitate engagement and discussion of such topics without advocating for, or promoting, practices that have not yet been adequately based on current science, evidence and/or clinical reasoning.
- In accordance with this standard, the UF COP CPE understands that it cannot maintain its accreditation status with ACPE if its educational programs advocate for unscientific approaches to diagnosis or therapy, or if its education promotes reconditions, treatments, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.

For more information, visit the Standards for Integrity and Independence in Accredited Continuing Education, see [Content Validity FAQ](#), on the UF COP CPE Faculty Guidance page.

Guideline 2: Prevent Commercial Bias and Marketing in Accredited Continuing Education

Guideline applies to all accredited continuing education

As an accredited continuing education provider, the UF COP CPE Office, must protect learners from commercial bias and marketing.

- The UF COP CPE Office will ensure that all decisions related to the planning, faculty selection, delivery, and evaluation of accredited continuing education programs or activities will be made without any influence or involvement from the owners and employees of an ineligible company.
- All accredited continuing education programs must be free of marketing or sales of products or

services. The UF COP CPE Office Director and staff, as well as faculty developing the educational content are not allowed to incorporate the promotion or sales of products or services that serve their professional or financial interest during an accredited continuing education program.

For more information, visit the Standards for Integrity and Independence in Accredited Continuing Education, see [Manage Commercial Bias FAQ](#), on the UF COP CPE Faculty Guidance page.

Guideline 3: Identify, Mitigate, and Disclose Relevant Financial Relationships

Guideline applies to all accredited continuing education

The UF COP CPE Office has the responsibility to ensure that CPE content is free of commercial bias and to resolve any potential conflicts. The UF COP CPE Office provides learners a Conflict of Interest Packet to all members of the Educational Activities Planning Committee (Activity Director, Speaker, Author(s), and Planning Committee Member[s]). The recipients are required to disclose all relevant financial relationships and conflicts of interest with any commercial interest by completing a conflict of interest form. A [disclosure packet](#) explaining the need to identify, mitigate, and disclosure relevant financial relationships is provided to the faculty and/or planning committee involved in developing the educational program. A completed [Disclosure Form for All Financial Relationships \(Planners, Faculty, and Others\)](#) is required to be provided to the UF COP CPE Office prior to the development of the continuing education program. Both forms are located on the [Faculty Guidance for Developing Continuing Education Programs](#) page located on the UF COP CPE website.

This requirement helps to ensure the following decisions are made free of control of the commercial interest for all CPE activities.

- Identification of CPE needs;
- Determination of educational objectives;
- Selection of presentation of content;
- Selection of all persons and organizations that will be in a position to control the content of the CPE;
- Selection of educational methods;
- Evaluation of the activity

Any individual who refuses to disclose relevant financial relationships will be disqualified from being a CPE Activity planning committee member, speaker, or author, and cannot have control of, or responsibility for, the development, management, presentation or evaluation of the CPE activity.

The UF COP CPE Office reviews all disclosure forms to determine if conflicts of interest exist and determine if an existing relevant financial relationship creates a conflict of interest that must be resolved rather than merely disclosed.

Financial relationships are relevant if the following three conditions are met for the individual who will control content of the education:

- A financial relationship, in **any amount**, exists between the person in control of content and an ineligible company.
- The financial relationship existed during the past **24 months**.
- The content of education is **related to the products** of an ineligible company with whom the person has a financial relationship.

The UF COP CPE Office reviews all disclosure forms to determine identify, mitigate, and disclose all relevant financial relationships. The UF COP CPE follows the [guidance outlined by ACPE to ensure the mitigation of relevant financial relationships](#) of planners faculty, and all others involved in the educational development

process for accredited programs.

Mitigation Steps for UF COP CPE

- Divest the financial relationship(s)
- Recusal from controlling aspects of planning and content with which there is a financial relationship
- Peer review of planning decisions by persons without relevant financial relationships
- Comprehensive review of relevant literature
- Presentation of evidence-based guidelines
- Review of guidelines and recommendations of national professional societies or pharmacy organizations
- Peer review of presentation materials
- Other strategies (individual must provide description of strategy)

Mitigation Steps for Faculty and Others

- Divest the financial relationship(s)
- Peer review of content by individual without relevant financial relationships
- Comprehensive review of relevant literature
- Presentation of evidence-based guidelines
- Review of guidelines and recommendations of national professional societies or pharmacy organizations
- Peer review of presentation materials
- Other strategies (individual must provide description of strategy)

It is common for healthcare professionals to have financial relations with ineligible companies. Such relationships are not allowed to influence accredited continuing education programs. The UF COP CPE is responsible for identifying relevant financial relationships between continuing education faculty and subject matter experts involved or in control of developing educational content. It is the responsibility of UF COP CPE to ensure these relevant financial relationships to not introduce commercial bias into the educational content. Per ACPE, financial relationships of any dollar amount are defined as relevant if the educational content is related to the business lines or products of the ineligible company.

Learners must be informed of any relevant financial relationships that were identified and resolved in the planning process to allow for full transparency. UF CPE requires any individual with relevant financial relationships to disclose to learners the following information:

- The name of the individual;
- The name of the commercial interest(s);
- The nature of the relationship the person has with each commercial interest.

For an individual with no relevant financial relationship(s) learners must be informed that no relevant financial relationship(s) exist.

Any commercial support and its source must also be disclosed to learners. When commercial support is provided 'in-kind,' the nature of the support must be disclosed to learners. 'Disclosure' must never include the use of a corporate logo, trade name, or a product/group message of an ACPE defined commercial interest.

A provider must disclose the above information to learners prior to the beginning of the educational activity

using standardized disclosure language provided below:

The UF COP CPE will follow the steps outlined below when developing accredited continuing education programs.

- **Collecting Information:** The UF COP CPE will collect information from all planners, faculty, and others in control of educational content about all their financial relationships with ineligible companies within the prior 24 months. There is no minimum financial threshold; individuals must disclose all financial relationships, regardless of the amount, with ineligible companies. Individuals must disclose regardless of their view of the relevance of the relationship to the education.

Disclosure information must include:

- The name of the ineligible company with which the person has a financial relationship.
- The nature of the financial relationship. Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.

- **Disclosure Language**

- No Disclosures

- Jane Doe, Pharm.D has disclosed that she has no relevant financial disclosures. No one else in a position to control content has any financial relationships to disclose.

- Disclosures

- John Doe, Pharm.D has disclosed that he is a former stockholder of Company X, Inc., a company which no longer exists. Dr. Doe receives financial or material support from the University of XXX for being named as a co-inventor on a pending patent for a genomic prescribing system. No one else in a position to control content has any financial relationships to disclose.

- **Exclusion of owners or employees of ineligible companies:** The UF COPE CPE will review the information provided about financial relationships to identify individuals who are owners or employees of ineligible companies. Individuals identified will be excluded from controlling content or participating as planners or faculty in accredited education. There are three exceptions to this exclusion—employees of ineligible companies can participate as planners or faculty in these specific situations:

- When the content of the activity is not related to the business lines or products of their employer/company.
 - When the content of the accredited continuing education activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations.
 - When they are participating as technicians to reach the safe and proper use of medical device, and do not recommend whether or when a device is used.

- **Identification of relevant financial relationships:** The UF COP Office will review the information about financial relationships to determine which relationship are relevant. Financial

relationships are relevant if the educational content an individual can control is related to the business lines or products of the ineligible company.

- **Mitigation of relevant financial relationship:** The UF COP CPE Office will take steps to prevent those with relevant financial relationships from inserting commercial bias into the educational content.
 - The UF COP CPE Office will mitigate relationships prior to the individuals assuming their roles and will take steps to ensure the appropriate to the role is bestowed upon the individual. For example, steps for planners will likely be different than for faculty and would occur before planning begins.
 - These steps to mitigate relevant financial relationships will be documented.
- **Disclosure of all relevant financial relationships to learners:** The UF COP CPE Office will take the following steps to disclose relevant financial relationships to learners prior to the educational program.
 - The names of the individuals with relevant financial relationships will be disclosed.
 - The names of the ineligible companies with which they have relationships.
 - The nature of the relationships.
 - A statement that all relevant financial relationships have been mitigated.
- **Identify ineligible companies by their name only.** Disclosure to learners must not include ineligible companies' corporate or product logos, trade names, or product group messages.
- **Disclose absence of relevant financial relationships.** Inform learners about planners, faculty, and others in control of content (either individually or as a group) with no relevant financial relationships with ineligible companies.
- **Learners must receive disclosure information,** in a format that can be verified at the time of accreditation, before engaging with the accredited education.
- **Exception:** Accredited providers do not need to identify, mitigate, or disclose relevant financial relationships for accredited education that is non-clinical, such as leadership or communication skills training.

For more information, visit the Standards for Integrity and Independence in Accredited Continuing Education, see [Identify, Mitigate, and Disclose Relevant Financial Relationships](#), on the UF COP CPE Faculty Guidance page.

Guideline 4: Manage Commercial Support Appropriately

Guideline applies only to accredited continuing education that receives financial or in-kind support from ineligible companies.

If the UF COP CPE Office chooses to accept commercial support (defined as financial or in-kind support from ineligible companies) it will be solely responsible for ensuring that the education remains independent of the ineligible company and that the support does not result in commercial bias or commercial influence in the education. The support does not establish a financial relationship between the ineligible company and planners, faculty, and others in control of content of the education.

- **Decision-making and disbursement:** The UF COP CPE will make all decisions regarding the receipt

and disbursement of the commercial support following the guidelines below.

- Ineligible companies must not pay directly for any of the expenses related to the education or the learners.
 - Commercial support may be used to fund honoraria or travel expenses of planners, faculty, and others in control of content for those roles only.
 - Commercial support must not be used to pay for travel, lodging, honoraria, or personal expenses for individual learners or groups of learners in accredited education.
 - Commercial support may be used to defray or eliminate the cost of the education for all learners.
- **Agreement:** The terms, conditions, and purposes of the commercial support must be documented in an agreement between the ineligible company and the UF COP CPE Office. The agreement must be executed prior to the start of the accredited education. The UF COP CPE Office can sign onto an existing agreement between an accredited provider and a commercial supporter by indicating its acceptance of the terms, conditions, and amount of commercial support it will receive.
 - **Accountability:** The UF COP CPE Office will keep a record of the amount or kind of commercial support received and how it was used, and will produce that accounting, upon request, by the accrediting body or by the ineligible company that provided the commercial support.
 - **Disclosure to learners:** The UF COP CPE Office will disclose to the learners the name(s) of the ineligible company(ies) that gave the commercial support, and the nature of the support if it was in-kind, prior to the learners engaging in the education. Disclosure must not include the ineligible companies' corporate or product logos, trade names, or product group messages.

Guideline 5: Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education

Guideline applies only when there is marketing by ineligible companies or no-accredited education associated with the accredited continuing education.

The UF COP CPE Office is responsible for ensuring that the educational is separate from marketing by ineligible companies – including advertising, sales, exhibits, and promotion – and from non-accredited education offered in conjunction with accredited continuing education.

- **Arrangements to allow ineligible companies to market or exhibit in association with accredited education must not:**
 - Influence any decisions related to the planning, delivery, and evaluation of the education.
 - Interfere with the presentation of the education.
 - Be a condition of the provision of financial or in-kind support from ineligible companies for the education.
- **The UF COP CPE Office will ensure that learners can easily distinguish between accredited education and other activities.**
 - Live continuing education activities: Marketing, exhibits, and non-accredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for continuing education must be clearly labeled and communicated as such.
 - Print, online, or digital continuing education activities: Learners must not be presented with marketing while engaged in the accredited education activity. Learners must be able to engage with the accredited education without having to click through, watch, listen to, or be presented

with product promotion or product-specific advertisement.

- Educational materials that are part of accredited education (such as slides, abstracts, handouts, evaluation mechanisms, or disclosure information) must not contain any marketing produced by or for an ineligible company, including corporate or product logos, trade names, or product group messages.
- Information distributed about accredited education that does not include educational content, such as schedules and logistical information, may include marketing by or for an ineligible company.
- **Ineligible companies may not provide access to, or distribute, accredited education to learners.**

For more information, visit the Standards for Integrity and Independence in Accredited Continuing Education, see [Identify, Mitigate, and Disclose Relevant Financial Relationships](#), on the UF COP CPE Faculty Guidance page.

Policy 16.0: Regularly Scheduled Series

The following policies are used to govern Regularly Scheduled Series (RSS) activities in accordance with the Accreditation Council for Pharmacy Education (ACPE) Policies and Procedures Manual, [see Policy 13](#). For any RSS, UF CPE will collaborate with UF College of Pharmacy departments and affiliated hospital systems activity directors throughout the entire course development and accreditation process. UF CPE will provide a timeline for the submission of required ACPE program information based on the initial release date for the RSS and each session date.

Regularly Scheduled Series Definition

An RSS is a series of multiple educational sessions for the same audience (e.g., professional staff of a hospital or health system) that occur on a regular basis (e.g., weekly, monthly) and is accredited using the same Universal Activity Number per session.

In order for an RSS to be designated with one UAN, each session within the series must have the same:

- Number of contact hours
- Overall learning objectives
- Activity type designation (e.g., knowledge, application, certificate)
- Target audience (e.g., hospital professional staff)
- Topic designator
- Format (live only)

The date, location, and subject matter of each session must be recorded to distinguish each session as a unique educational offering. No more than one RSS session per UAN may occur on a given date.

UF CPE provides the following services for all RSS CPE activities:

- Provides guidance to CPE Activity Director and Program Faculty regarding ACPE requirements, teaching and learning strategies, and any other educational needs.
- Ensures all program materials meet accreditation standards outlined by ACPE.
- Provides a mechanism for program evaluation in compliance with ACPE standards.
- Documents and provides a written summary of program evaluation data and feedback for program faculty and CPE Activity Director.
- Reports CPE credit and/or issues statements of credit as appropriate.
- Ensures that ACPE's Standards for Commercial Support are met (e.g., financial relationship disclosures, resolution of conflict of interest, disclosure of commercial support and relevant financial relationship to participants).

UF CPE retains the right to have input on, and final approval of, the following items for all RSS CPE activities:

- Number of contact hours awarded
- Activity title
- Gap analysis and needs assessment
- Overall learning objectives appropriate to pharmacists and/or pharmacy technicians and target audience(s)
- Activity announcement literature (e.g., websites, brochures, flyers, email marketing)
- Activity format (e.g., live, home study, live and home study)
- Amount of CPE credit to be awarded
- Activity type designation (e.g., knowledge, application, or certificate)

- Activity agenda
- Target audience designation (e.g., pharmacist and/or pharmacy technician)
- Program faculty
- Disclosures (e.g., planning committee, speakers, authors, content reviewers)
- CVs (e.g., planning committee, speakers, authors, content reviewers)
- Financial sponsors/grantors/commercial supporters
- Program planning process
- Educational materials (e.g., PowerPoint or other presentation materials/slides, monographs, handouts)
- Learning Assessment questions
- Program budget

The following timeline/deadlines apply to all RSS CPE Activities:

- 90 days prior to the initial release date:

The Activity Director must contact UF CPE to request program planning materials (e.g., faculty guidance, disclosure forms, and a list of ACPE requirements) and state their intent to collaborate with UF CPE to create an RSS. UF CPE will provide a faculty guidance document, blank disclosure forms, and schedule regular planning meetings with the activity director and will only partner with programs that align with the mission of the office.

- 60 days prior to the initial release date:

The Activity Director and UF CPE must finalize the following items, which are developed in conjunction with the UF CPE faculty and administration through a collaborative planning process:

- Activity title
- Gap analysis and needs assessment
- Overall learning objectives appropriate to pharmacists and/or pharmacy technicians
- Activity announcement literature (e.g., websites, brochures, flyers, email marketing)
- Activity format (e.g., live, home study, live and home study)
- Amount of CPE credit to be awarded
- Activity Type (e.g., knowledge, application, practice)
- Activity Agenda
- Target audience designation (e.g., pharmacist and/or pharmacy technician)
- List of program faculty and program planning committee, including each individual's degree, credentials, organization and job title
- Disclosures (e.g., planning committee, speakers, authors, content reviewers)
- CVs (e.g., planning committee, speakers, authors, content reviewers)
- List of financial sponsors/grantors/commercial supporters
- Program budget
- Program planning process
- Dates of each scheduled session within the series

UF CPE will work with the activity director to ensure the RSS program materials are in compliance with ACPE requirements. and provide feedback to the Activity Director within 15 days of submission. Any requested revisions must be submitted to UF CPE within 10 days of receipt of the request.

At this time, UF CPE will grant conditional approval to the RSS CPE Activity upon receipt of all required documentation. Final approval will occur once the educational materials and active learning

questions are peer-reviewed by UF COP faculty for each session date (see below). and any requested revisions are completed.

The UF CPE Office will apply for the Universal Activity Number and create the online program evaluation once the RSS is conditionally approved.

- Universal Activity Number
- Program evaluation
- CPE Credit reporting information and instructions

This Universal Activity Number and program evaluation will remain the same for each session date within the RSS CPE Activity.

UF CPE understands the final program faculty may not be secured for all of the session dates within the series at the time of conditional accreditation. The Activity Director must submit any schedule changes (e.g., program dates and/or program faculty) within 21 days of the scheduled session date. Failure to comply will result in the session date not being eligible for credit.

- 21 days prior to the session date:

The Activity Director and UF CPE will work together to finalize the following:

- Educational materials (e.g., PowerPoint or other presentation materials/slides, monographs, handouts)
- Active learning questions (must be appropriate based on the activity type)
- Any program changes that occurred since original submission

UF CPE faculty will ensure the educational materials and active learning assessments are educationally sound and based on current literature and consistent with the overall educational objective and meet the requirements of the program activity type. The assessment questions will be reviewed by UF CPE to make sure they meet the requirements of the program's activity type. If revisions are requested, the activity director must re-submit within 10 days for the activity to be eligible for accreditation.

UF CPE will grant final approval of this RSS session date after all program material is collected and the office can ensure its compliance with ACPE standards.

These documents and this review process must occur for each session date within the RSS series. Failure to meet these requirements will result in the session date not being eligible for CPE credit.

Credit reporting information will be provided to the program faculty so he/she can provide it to the learner at the end of each session.

Credit Reporting Information

- UF CPE Office will report CPE credit for participants who sign in and complete the online program evaluation.
- UF CPE will report CPE credit to CPE Monitor and CE Broker, as applicable. Paper statements of CPE credit can be printed from the participant's NABP e-profile.
- A credit reporting fee will be applied, even if credit is not reported due to the pharmacist, technician, or Activity Director providing incorrect information (e.g., license number(s), DOB).
- Participants will be notified that all pharmacists and pharmacy technicians should maintain their own license and/or certification and it is their responsibility to follow up with UF CPE regarding credit discrepancies.

- UF CPE reserves the right to award or deny credit to a late-claiming participant (e.g., ≥ 60 days after participation in the CPE activity).
- UF CPE reserves the right to request access to CPE Monitor[®] if the activity in question occurred within the previous 6 months and with an appropriate reason for access, i.e. power outage, etc.
- Participants should contact UF CPE with any questions or credit reporting discrepancies.

- 15 days after the session date:

The Program Faculty must submit a sign-in sheet verifying individual attendance. Once the sign-in sheet is received, the CPE office will close the evaluation, report CPE credit, aggregate program and speaker evaluation data, and communicate the evaluation summary to the Program Faculty.

UF CPE will report credit for participants who sign in and complete the online program evaluation. UF CPE will contact the individual—regarding reporting errors to request accurate CPE reporting information. Upon request, participants have 7 days to submit accurate reporting information.

Policy 17: Opioid Analgesics Risk Evaluation and Mitigation Strategy (REMS)

The UF COP CPE Office will follow the guidance activities as outlined in [Policy 14: Opioid Analgesics Risk Evaluation and Mitigation Strategy](#) (REM) of the ACPE Policies and Procedures Manual: A Guide for ACPE-accredited Providers.

As outlined in the ACPE Policies and Procedures Manual, the FDA required REMS program is a strategy set in place to assist in ensuring that the benefits of opioid analgesics outweigh the risks before being prescribed to patients. The REMS program requires that training be made available to all health care providers (HCPs) who are involved in the management of patients with pain, including nurses and pharmacists. The goal of REMS-compliant programs is to combat the current prescription drug abuse epidemic.

The UF COP CPE will ensure that REMS-compliant activities meet the following accreditation requirements:

- All activities must be delivered by an accredited continuing education (CE) provider
- Will incorporate all aspects of the FDA Opioid Analgesic REMS Education Blueprint for Health Care Providers Involved in the Treatment and Monitoring of Patients with Pain
- Will include a post-course knowledge assessment
- Are subject to independent audit of content and compliance with applicable accrediting standards

The UF COP CPE will follow the following procedures as outlined by the ACPE Policies and Procedures Manual: A Guide for ACPE-accredited Providers.

- All components of the FDA approved blueprint must be incorporated into the CE activities.
- Manufacturers of the opioid analgesics, known as REMS Program Companies (RPC), support funding for all REMS-compliant CE activities.
- The activities should meet the above requirements, contain keywords (opioid, TEMS) and be entered into the Provider Web Tool. Under the General Activity Information tab, select 'yes' REMS to be distinguished from other CPE activities.
- All RPC-supported REMS-compliant training activities from accredited CE providers will be made available and listed on the REMS website.
- Monitoring: Accredited providers who offer RPC-funded opioid analgesics TEMS training will be asked to demonstrate compliance with ACPE Accreditation Standards for Continuing Pharmacy Education and Polices being subject to audit.

Appendix 1

Activity Announcement Checklist

Activity Announcements Required Items	Activity
A. Objectives: verbs must elicit or describe observable or measurable behaviors on the part of participants. (<u>Avoid</u> “understand,” “learn,” etc.) *	
B. Type of activity, i.e., knowledge, application, certificate program*	
C. Target audience(s) that may best benefit from participation in the activity	
D. Faculty member(s) name, degree, and title/position*	
E. Fees for the activity	
F. Schedule of the educational activities	
G. The amount of CPE credit, specified in contact hours or CEUs	
H. The official ACPE logo, used in conjunction with the statement identifying the accredited provider sponsoring the activity: <p style="margin-left: 40px;">“The [name of accredited provider] is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education.”</p> <p style="margin-left: 40px;">(Optional: listing the ACPE-accredited or non-accredited co-sponsor - if applicable)</p>	
I. The ACPE Universal Activity Number assigned to the activity with the appropriate target audience designation (‘P’ and/or ‘T’) in the activity UAN	
J. A full description of all requirements established by the provider for successful completion of the CPE activity and subsequent awarding of credit <p style="margin-left: 40px;">(e.g., passing a post-test at a specified proficiency level, completing an activity evaluation form, participating in all sessions or certain combinations of sessions that have been designed as a track, NABP e-PID number, month/day of birth for submission to CPE Monitor®, etc.).</p>	
K. Acknowledgment of any organization(s) providing financial support for any component of the educational activity of the CPE activity	
L. For home study activities: the initial release date and the expiration date.	
M. For Virtual events: Access to System requirements: The Internet browser(s) supported and minimum versions of each required by the learner to complete the online activity; The minimum memory, storage, processor, and internet speeds require by the learner to complete the online activity	

*Note: for multi-day conferences, the learning objectives may be listed for the overall conference instead of individual activities on the activity announcement. The items with an asterisk must be listed in the final conference program if they are not listed on the activity announcement. If the items are not listed in the respective locations, then the item should be rated as ‘Needs Improvement.’

Appendix 2

Education Slide Review Criteria

The criteria listed below are assessed by a pharmacy faculty member and rated as follow: No Changes Necessary, Revisions Suggested, Revisions Required

Follow-up and revisions are conducted with the speaker as needed to ensure slides meet stated criteria.

Slide 2: The speakers' disclosures are listed

Speaker X has disclosed that she/he has no relevant financial disclosures. No one else in a position to control content has any financial relationships to disclose.

Speaker X has disclosed that he/she is <insert disclosure>. No one else in a position to control content has any financial relationships to disclose.

Slide 3: ACPE official statement and logo included

“The University of Florida is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education.”

Slide 4: List of final, approved activity objectives

- The stated learning objectives were met
- The educational content is evidence-based (e.g., references are current and appropriate)
- The educational activity is free of commercial bias
- The educational activity is well organized with concepts clearly explained
- The educational content lacks grammar and/or spelling errors
- The slide layout is visually appealing and easy to read (e.g., the font is easy to read and appropriately sized)
- The number of slides is appropriate for the allotted presentation time
- The images and graphics are free of copyright issues and cited appropriately
- All brand names are accompanied by the generic drug name(s)
- Two to three active learning questions are included in the presentation
- The presentation meets the requirements of the activity type (e.g., knowledge -, application -, practice-based)

Education Evaluation Questions

Participant Information (Collected)

1. First Name
2. Last Name
3. Date of Birth (MMDD)
4. Email
5. Phone
6. State
7. Country
8. NABP License Number, if applicable
9. RPT License Number, if applicable
10. Occupation
 - a. Pharmacist or Technician

11. Area of Practice (pharmacist only)

- Community Pharmacist – Independent
- Hospital Pharmacist
- Community Pharmacist – Chain
- Pharmacist – Armed Services or Regulatory Agency
- Pharmacist – Other Government
- Specialty Pharmacist Practice
- Ambulatory/Clinical-Based Practice
- Other, please specify.

12. Length of Practice (in years)

- 0-5
- 6-10
- 11-15
- 16-20
- 21-25
- 26-30
- 30+

Achievement of Pharmacist Objectives (Separate objectives listed depending on whether “pharmacist” or “technician” is selected as occupation)

Did the activity achieve the following learning objectives? (Likert Scale)

- Objective 1: [insert objective]**
 - Strongly Agree
 - Agree
 - Disagree
 - Strongly Agree
 - If Disagree or Strongly Disagree was selected, please explain why.

- Objective 2: [insert objective]**
 - Strongly Agree
 - Agree

- Disagree
- Strongly Agree
- If Disagree or Strongly Disagree was selected, please explain why.

□ **Objective 3: [insert objective]**

- Strongly Agree
- Agree
- Disagree
- Strongly Agree
- If Disagree or Strongly Disagree was selected, please explain why.

Effectiveness/Quality of Teaching and Learning Methods

All learners answer the following questions, but activity-specific pharmacist and technician evaluation data are collected and summarized separately for educational and ongoing quality improvement purposes:

Please rate the following: (Likert Scale)

1. The usefulness of the educational materials.

- Excellent
- Good
- Fair
- Poor

2. The value of the content based on your educational needs.

- Excellent
- Good
- Fair
- Poor

3. The effectiveness of the teaching and learning methods.

- Excellent
- Good
- Fair
- Poor

4. The active learning techniques were effective. (Active learning is defined as being activity engaged in the learning process, rather than “passively” absorbing lectures).

- Excellent
- Good
- Fair
- Poor

5. The learning assessment activities.

- Excellent
- Good
- Fair
- Poor

6. The overall quality of the presentation.

- Excellent
- Good
- Fair
- Poor

Speaker Questions (Likert Scale)

Was the activity presented in a fair and unbiased manner?

- Yes
- No
- If no was selected, please explain.

Please rate each of the following (Excellent, Good, Fair, Poor)

1. The speaker's knowledge of the topic.

- Excellent
- Good
- Fair
- Poor

2. The speaker's organization in the presentation.

- Excellent
- Good
- Fair
- Poor

3. The overall quality of the speaker.

- Excellent
- Good
- Fair
- Poor

4. Please provide any additional comments and/or feedback you may have for the speaker.

[Free text response]

Needs Assessment Questions

1. What additional topics would be of benefit to your professional development and practice improvement? Select all that apply.

- Aging
- Antibiotic Stewardship
- Anticoagulation
- Cancer
- Cardiology
- Career Development
- Consultant
- Controlled Substances
- Dementia
- Depression
- Diabetes

- Entrepreneurial Approaches
- Geriatrics
- Hepatitis
- HIV/AIDS
- Medication Non-Adherence
- Medication Therapy Management
- Motivational Interviewing
- Non-Compliance
- Obesity
- Osteoporosis
- Substance Abuse
- Teaching
- Telepharmacy
- Veterinary Pharmacy
- Other, please specify.

2. Which length would you prefer for a live CE program? Select all that apply.

- 1-2 hour programs
- Half day
- Full day
- Multiple days
- No preference

3. Which CE program format(s) are you interested in? Select all that apply.

- Live
- In-person
- Live Webinar
- Live Teleconference
- Recorded Webinar
- Monograph (printed materials)
- Other, please specify