

**OFFICE OF CONTINUING PHARMACY EDUCATION  
FACULTY GUIDANCE**

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## Section 1: Overview

The Accreditation Council for Pharmacy Education (ACPE) defines continuing education as “a structured educational activity designed or intended to support the continuing development of pharmacists and/or pharmacy technicians to maintain and enhance their competence. Continuing pharmacy education (CPE) should promote problem-solving and critical thinking and be applicable to the practice of pharmacy.”

Continuing pharmacy education activities must follow an outcomes-based educational model (**Figure 1**). Each step of the model is associated with particular planning activities, and the model as a whole calls for accredited programs to be improved over time based on their performance in achieving their stated educational goals.

**Figure 1: Five Required Elements to Address in a CPE Activity**



Adapted from the Continuing Education Administrator Workshop in Nashville, TN on July 15, 2017.

## Section 2: Needs Assessment and Gap Analysis

A needs assessment is a systematic process used to identify the educational gap/need between an individual's current level and the desired level of knowledge, skills, or attitudes. The educational gap/need that is identified guides the development of the educational activity, including the educational need it fills and its objectives. **Separate needs assessments are required for pharmacist and technicians.** For the needs assessment to be effective it must be completed prior to planning the CPE activity.

There are three key components that must be addressed in a needs assessment (**Figure 2**):

- Identification of the **actual state of practice**
- Definition of the **ideal state of practice**
- Determination that there is an educational **gap between the actual and ideal practice**

**Figure 2: Identifying the Educational Gap**



Adapted from the Continuing Education Administrator Workshop in Nashville, TN on July 15, 2017.

Reasons for an educational gap may include:

- Lack of early recognition of an emerging topic or issue.
- Inappropriate management of a disease, condition, or professional practice problem.
- Challenges to stay current with rapid advances in the field, new drugs, etc.
- Lack of experience in managing or treating a disease.
- Lack of education or training; training is inadequate/out of date
- Condition is poorly understood

Performing and documenting a formal needs assessment process is an essential step in developing educational activities. This process helps to ensure that the educational activity is addressing a true existing need and is doing so in a way that will help learners to meet this need. Table 1 provides a sample needs assessment and educational gap analysis for an activity that is designed to change learner competence.

**Table 1. Sample Needs Assessment/Educational Gap Analysis Planning**

<b>Educational Need</b>	<b>Current Practice</b>	<b>Educational Gap</b>
Increased knowledge on the mechanism of actions for different pain conditions and the role of medical therapies in pain management	Drugs that are often prescribed for pain relief are not always the same depending on mechanism of action of the pain symptoms	Physicians and pharmacists require additional education to fully understand the differences between pain conditions and appropriate therapies for pain management
Identification of pain conditions and referral of patients to pain specialists for proper management of pain conditions	Widespread pain is presented and treated in primary care as multiple episodes of regional pain	Primary Care Physicians lack the knowledge to properly diagnose chronic widespread pain, which is common in the community
Understanding of the value in patient education for compliance with prescribing practices	Patients are more likely to remain compliant with prescribing information if they can better understand their condition and treatment regimens	Physicians and pharmacists are unfamiliar with effective patient education materials to manage chronic pain
Increased understanding of the practice strategies that perpetuate effective treatment plans	Clinicians must carefully rule out other causes of chronic widespread pain, look for common coexisting syndromes and maximize treatment with both pharmacologic and non-pharmacologic treatment	Physicians and pharmacists lack the knowledge of basic strategies for effective treatment plans that include assessment, documentation, and continuous evaluation

Adapted from the Continuing Education Administrator Workshop in Nashville, TN on July 15, 2017.

### Section 3: Activity Type

Continuing Pharmacy Education (CPE) activities are categorized into three types: knowledge-, application-, and practice-based. Prior to educational program planning and 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 office's mission and goals and will meet the educational needs of pharmacists and/or pharmacy technicians.

#### 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 2: Overview of CPE Activity Types**

<b>Activity</b>	<b>Activity Purpose</b>	<b>Learning Assessment</b>	<b>Assessment Feedback</b>
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

## Section 4: Learning Objectives

Learning objectives should be written after the completion of the needs assessment and should describe what the speaker wants the learner to be able to do upon completion of the activity (**Figure 3**). The type of learning objective you develop will be determined by the type of activity you are preparing (knowledge-based, application-based, or certificate program). Learning objectives should state what the pharmacist and/or technician should be able to do at the completion of the learning activity.

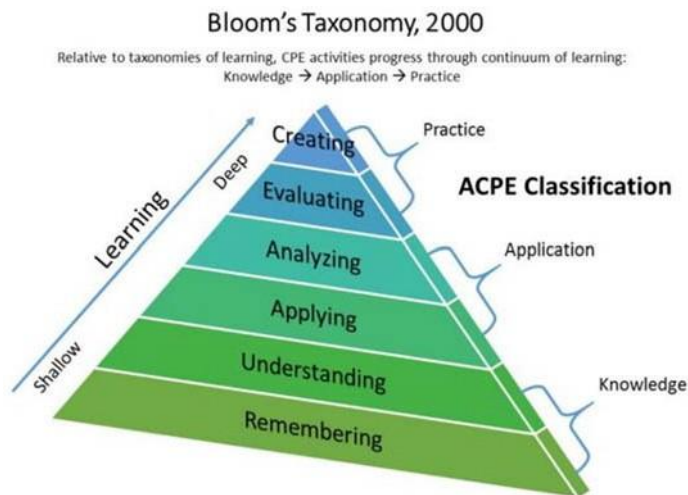
Learning objectives must be different for pharmacists and technicians as their professional responsibilities differ. When defining course objectives, please refer to Bloom's Taxonomy (**Figure 4**) for guidance on the type of objectives that are appropriate for your learning activity. **Table 2** provides a list of Bloom's Taxonomy verbs for further help in writing objectives.

**Figure 3: Stages of CPE Development**



Adapted from the Continuing Education Administrator Workshop in Nashville, TN on July 15, 2017.

**Figure 4: Bloom's Taxonomy, 2000**



Bloom BS (ed.). Taxonomy of Educational Objectives: The Classification of Educational Goals. Handbook I: Cognitive Domain. New York: McKay 1956. Adapted from Phillips, L. The Continuing Education Guide. Kendall/Hunt Publishing Company. Dubuque, Iowa, 1994.

**Learning objectives should:**

- Be specific and measurable
- Be developed to specifically address the identified educational need of the pharmacist and technician
- Separate objectives are required for pharmacists and pharmacy technicians
- Match the activity type selected (knowledge, application, or certificate)
- Be addressed by an active learning activity
- Be covered by a learning assessment

**Table 3. List of Bloom’s Taxonomy Action Verbs**

<b>Knowledge</b> <i>Remembering and Understanding</i>			<b>Application</b> <i>Applying and Analyzing</i>			<b>Certificate</b> <i>Synthesizing and Evaluating</i>	
Arrange	Interpret	Analyze	Distinguish	Relate	Adapt	Defend	Predict
Choose	Label	Apply	Dramatize	Schedule	Appraise	Describe	Prepare
Classify	List	Appraise	Employ	Select	Apprise	Design	Prioritize
Compare	Locate	Assume	Examine	Separate	Argue	Determine	Propose
Contrast	Match	Breakdown	Experiment	Show	Arrange	Develop	Prove
Convert	Memorize	Build	Function	Sketch	Assemble	Devise	Rate
Defend	Name	Calculate	Identify	Solve	Assess	Discriminate	Rearrange
Define	Omit	Categorize	Illustrate	Test	Attach	Disprove	Reconstruct
Demonstrate	Outline	Change	Infer	Use	Build	Elaborate	Relate
Describe	Paraphrase	Choose	Inference	Utilize	Categorize	Estimate	Reorganize
Differentiate	Predict	Classify	Inspect	Write	Change	Evaluate	Report
Discuss	Recall	Compare	Interpret		Choose	Explain	Revise
Distinguish	Recognize	Compute	Manipulate		Collect	Formulate	Rewrite
Duplicate	Relate	Construct	Model		Combine	Generate	Schematize
Estimate	Rephrase	Contrast	Modify		Compare	Improve	Select
Explain	Report	Criticize	Operate		Compile	influence	Set-up
Express	Reproduce	Deduce	Organize		Comply	Interpret	Solve
Extend	Restate	Demonstrate	Outline		Compose	Invent	Summarize
Find	Review	Derive	Plan		Conclude	Judge	Support
Generalize	Rewrite	Develop	Point Out		Construct	Justify	Suppose
Give Examples	Select	Diagram	Practice		Create	Measure	Synthesize
Identify	Show	Differentiate	Predict		Criteria	Minimize	Tell
Illustrate	State	Discover	Prepare		Criticize	Modify	Test
Indicate	Summarize	Discriminate	Produce		Decide	Originate	Theory
Infer	Tell	Discuss	Question		Deduct	Perceive	Value
						Plan	Write



## **Section 5: Teaching and Learning Methods**

All CPE activities must incorporate active participation and involvement of the learner through the use of active learning strategies. Active learning strategies should be included in all types of CPE activities, including live presentations and home-study activities, and should be determined by the CPE activity planned. ACPE provides guidance on developing active learning activities based on activity type and Bloom's Taxonomy Level, see [Suggested Active Learning Strategies for USE with ACPE's CPE Activity Types and Bloom's Taxonomy Levels](#).

## Section 6: Learning Assessment

Each educational activity must include a learning assessment to allow pharmacists and/or pharmacy technicians to assess their achievement of the learning objectives and learned content. A learning assessment objectively validates what learners can and cannot do. The learning assessment must be consistent with the activity type and objectives.

CPE Educational Presenters/Faculty must:

- engage learners by incorporating appropriate active learning strategies into the presentation
- assess learner’s achievement of the learning objectives and notify learners of their performance on the assessment

Speakers may select formal or informal learning assessment techniques. Formal assessment techniques such as tests and quizzes are typically individualized, written, and graded. The assessment must be consistent with the activity type (knowledge-based, application-based, or certificate program) and with the learning objectives. Each learning objective must be covered by a learning assessment question and assessment methods should be aligned with instructional strategies.

- Knowledge-based CPE activity: Each CPE activity in this category must include assessment questions structured to determine recall of facts.
- Application-based CPE activity: Each CPE activity in this category must include case studies structured to address application of the principles learned.
- Certificate Program: Each CPE activity in this category must include formative and summative assessments that demonstrate that the pharmacists and technicians achieved the stated objectives.

**Table 4: Alignment of Instructional and Assessment Strategies**

Instructional Strategies	Assessment Strategies	Knowledge-Based Activity	Application-Based Activity	Certificate Program
Lectures, readings	MCQ questions that may be either embedded in the presentation and provided at the end of the presentation. Another option is pre- and post-tests.	X	X	X
Lectures, reading assignments	Games and quizzes to practice recall	X	X	X
Demonstration	Skills assessment using a checklist/ rubric		X	X
Example of performance/product followed by learner practice	Skills assessment using a checklist/ rubric		X	X
Interactive case study	Assessment questions that are embedded in the presentation		X	X
Interactive scenario	Assessment questions that are embedded in the presentation		X	X
Role play	Skills assessment using a checklist/ rubric		X	X
Simulation	Skills assessment using a checklist/ rubric		X	X
Application exercises (online, classroom or lab-based experience)	Assessment questions that are embedded in the exercises or at the end of the exercise		X	X
Practice exercises (in the practice setting)	Observation based assessment (e.g., rubric) or assessment of products documenting performance (submission of progress note, patient workup)		X	X

## **Section 7: Assessment Feedback**

Learning assessment feedback must be provided in an appropriate, timely, and constructive manner. It is important for the learner to be able to assess their achievement of the learned content.

Appropriate activities to provide learner feedback in live CPE activities may include group discussion, case presentation with explanation of correct answers, or use of an answer response system with audience discussion. For home-based CPE activities, assessment feedback may include providing correct answers to questions after learner completes the assessment and providing the rationale for correct and incorrect answers to the learner after completion of the assessment.

Verbal and written feedback may be provided as follows:

- **Knowledge-based activity:** Feedback must include the correct response to a question. For incorrect questions, the provider is encouraged to communicate that the question was answered incorrectly and provide the rationale for the correct response.
- **Application-based activity:** Feedback must include the correct response to questions. For incorrect responses, the provider is encouraged to explain the rationale for the correct responses.
- **Certificate Program:** Feedback should be provided based on the formative and summative assessments that were used to demonstrate that the pharmacists or technician achieved the stated objectives.

### **Home-Based CPE Activities**

For home-based CPE activities, assessment feedback may include providing correct answers to questions after learner completes the assessment and providing the rationale for correct and incorrect answers to the learner after completion of the assessment.

### **Live CPE Activities**

Appropriate activities to provide learner feedback in live CPE activities may include group discussion, case presentation with explanation of correct answers, or use of an answer response system with audience discussion. Assessment feedback should be provided in real-time to the audience. An explanation of the answer should be provided and learners should have the opportunity to ask follow-up questions.

Depending on the activity, formal and/or informal techniques may be used. Informal techniques generally include participant discussion. Formal techniques include tests and quizzes and are typically individualized, written, and graded.

## **Section 8: Activity Announcement**

All materials that offer the opportunity to participate, purchase, or register for a CPE activity must include specific information as identified by the ACPE. Please review and use these criteria when composing your activity announcement.

### **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-based, application-based, certificate program;
- 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.

### **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.

### **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.

### **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-based, application-based, or certificate program.

### **Additional Requirements for Announcement Materials**

These rules do 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.”

## Section 9: Topic Designator Definitions

There are nine topic designators and each defines the topic the activity is related. The appropriate topic designator must be chosen prior to the course being added to ACPE.

- **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.

## Section 10: Legal and Ethical Requirements

### **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.

### **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 relationships 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:** TH 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.

## **Section 11: Copyright and Citations**

### **Copyright**

Copyright is a form of intellectual property law governing ownership of works created by individuals or groups. Content authors do not need to register their work with the U.S. Copyright Office or include a copyright notice in order for it to be protected.

The UF COP CPE Office requires all educational activities to use the appropriate American Medical Association citations for references and images (e.g., PowerPoint presentations, monographs, etc.). References must be included throughout the educational activity and listed as its conclusion.

### **Material That Must Be Cited**

- Any copyrighted evidence-based sources (e.g., journal article)
- Anything that is not your own creation or idea including your own previous work
- Anything easily accessible and freely available (e.g., Google Search, CDC, NIH, etc.)
- Anything in the public domain or under a Creative Commons license

### **Materials That Do Not Need to Be Cited:**

- Original experience, thoughts, or the results of your own experiments
- Common knowledge including myths, legends, historical events, and widely accepted facts

Use only images, graphics, or other media that you have obtained permission to use. If you have permission to use a copyrighted work as part of the presentation, include a brief statement and the reference, to that effect as a caption to that image. For example, “Chart included courtesy of the University of Florida,” as well as the reference.

For images that are in the public domain or available under a Creative Commons license, include a caption such as “Image available under a Creative Commons license,” as well as a reference. For more information regarding AMA format and proper referencing, please reference the AMA Manual of Style: A Guide for Authors and Editors.



## Section 12: Content, Formatting Slides, and Presentation Tips

Educational activities should be organized in a way that is mindful of the needs of learners, paying special attention to the learning activity's target audience (pharmacists, pharmacy technicians, or both; activity type, and objectives). Every concept that is important to your learning activity should be explained clearly in your presentation. Your presentation must be evidence based and, accordingly, use current, appropriate references throughout. It must also contain educational content that corresponds with each of the educational activities learning objectives.

### Slide Review

Educational activities using PowerPoint presentations will be peer-reviewed using the following criteria:

- **Slide 1:** Presentation name, presenter name, degree(s), and affiliations
- **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)

### Tips for Creating and Delivering an Effective Presentation

Speakers are encouraged to review the *Tips for Creating and Delivering an Effective Presentation* when creating a PowerPoint slide presentation.

- Minimize the number of slides to maintain a clear message
- Choose a font and size the audience can read from a distance
- Keep your text simple. Use bullets or short sentences. Avoid long paragraphs
- Use graphics when appropriate to convey your message
- Use charts and graphs when appropriate to help convey your messages
- Use a slide background that is subtle
- Use high contrast colors between background text color and text color
- Check spelling and grammar
- Practice your presentation prior to the day of the activity
- Arrive to your presentation location at least 30 minutes early
- Verify the equipment is working properly
- Test your presentation using the AV system provided to ensure it is compatible and that your presentation displays correctly
- Avoid moving the pointer or "clicker" unconsciously
- Stay on time
- Monitor your audience's behavior

## Section 13: Important ACPE Definitions

**Accreditation:** A voluntary process in which an institution, organization or agency submits to an in-depth analysis to determine its capacity to provide quality continuing pharmacy education in accord with standards, policies and procedures.

**Active learning:** A process whereby pharmacists and/or pharmacy technicians are actively engaged in the learning process, rather than "passively" absorbing lectures. Active learning involves reading, writing, discussion, and engagement in solving problems, analysis, synthesis, and evaluation. Faculty usually takes a more guiding role.

**Activity:** An educational event, which is based upon identified needs, has a purpose or objectives, and is evaluated to assure the needs are met. An activity is designed to support the continuing professional development of pharmacists and/or pharmacy technicians to maintain and enhance their competence. Each CPE activity should promote problem-solving and critical thinking while being applicable to the practice of pharmacy as defined by the current Definition of Continuing Pharmacy Education. The CPE activities should be designed according to the appropriate roles and responsibilities of the pharmacists and/or pharmacy technician.

**Accredited Provider:** An institution, organization or agency that has been recognized by the Accreditation Council for Pharmacy Education, in accord with its policy and procedures, as having demonstrated compliance with the standards which are indicative of the provider's capability to develop and deliver quality continuing pharmacy education.

**Assessment:** The Latin root 'assidere' means to sit beside. In an educational context it is the process of observing learning, such as describing, collecting, recording, scoring, and interpreting information about a pharmacist's and/or technician's learning. Assessments are used to determine achievement of objectives.

**Case study or scenario:** A description of a situation that requires problem-solving and/or investigation by the learner, e.g. application of learned material to provide a solution to the problem.

**Commercial Bias:** A personal judgment in favor of a specific proprietary business interest of a commercial interest.

**Commercial Interest:** A 'commercial interest' is any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical service directly to patients are not 'commercial interests.'

**Commercial Support:** Financial, or in-kind, contributions given by a commercial interest, which is used to pay all or part of the costs of a CPE activity.

**Conflict of Interest (with regard to Standards for Commercial Support):** When an individual's interests are aligned with those of a commercial interest the interests of the individual are in 'conflict' with the interests of the public. ACPE considers financial relationships to create actual conflicts of interest in CPE when individuals have both a financial relationship with a commercial interest and the opportunity to affect the content of CPE about the products or services of that commercial interest.

**Contact Hour:** A unit of measure of educational credit which is equivalent to 60 minutes of participation in an organized learning experience.

**Continuing Education:** Continuing education for the profession of pharmacy is a structured educational activity designed or intended to support the continuing development of pharmacists and/or pharmacy technicians to maintain and enhance their competence. Continuing pharmacy education (CPE) should promote problem-solving and critical thinking and be applicable to the practice of pharmacy.

**Continuing Pharmacy Education (CPE):** Continuing education for the profession of pharmacy is a structured educational activity designed or intended to support the continuing development of pharmacists and/or pharmacy technicians to maintain and enhance their competence. Continuing pharmacy education (CPE) should promote problem-solving and critical thinking and be applicable to the practice of pharmacy.

**Continuing Professional Development:** A self-directed, ongoing, systematic and outcomes-focused approach to lifelong

learning that is applied into practice. It involves the process of active participation in formal and informal learning activities that assist in developing and maintaining competence, enhancing professional practice, and supporting achievement of career goals.

**Curricular-based:** CPE activities that are designed to be building blocks of knowledge, skills and attitudes for a specific disease state, task, etc.

**Enduring Materials (Home Study):** Enduring materials are home study activities that are printed, recorded or computer assisted instructional materials that do not provide for direct interaction between faculty and learners.

**Evidence-based medicine:** The conscientious, explicit and judicious use of current best evidence in making decisions about the care of individual patients. (Centre for Evidence-Based Medicine)

**Faculty:** A person(s) who guides and delivers or writes the content of a CPE activity.

**Financial Relationships:** Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected.

**Goal:** A concise written statement of what the provider intends to achieve for pharmacy and/or pharmacy technician education at a certain point in the future. The CPE goal should address how a provider will assist pharmacists and/or pharmacy technicians to maintain and enhance their professional competencies to practice in various settings.

**Live Activities:** CPE activities that provide for direct interaction between faculty and learners and may include lectures, symposia, live teleconferences, workshops, etc.

**Mission:** A statement that is consistent with the program goals and specifically indicates the provider's short-term intent in conducting CPE activities including the intended audience(s) and scope of activities.

**Needs assessment:** Identification of educational needs that serve as the basis for planning CPE activities.

**Non-commercialism:** Continuing pharmacy education activities that provide an in-depth presentation with fair, full disclosure of conflicts of interest as well as objectivity and balance. Appropriate topics and learning activities shall be distinguished from those topics and learning activities that are promotional or appear to be intended for the purpose of endorsing either a specific commercial drug or other commercial product (as contrasted with the generic product/drug entity and its contents or the general therapeutic area that it addresses), or a specific commercial service (as contrasted with the general service area and/or the aspects or problems of professional practice that it addresses).

**Objectives:** Statements that describe what the pharmacists and/or pharmacy technician can expect to know or be able to do after completion of the CPE activity. Objectives are preferably written in behavioral terminology and should suggest outcome measures for an activity's success or effectiveness.

**Outcome:** The end result of a learning activity measured by evaluation or change in practice.

**Pharmacy Technician:** An individual working in a pharmacy who, under the supervision of a licensed pharmacist, assists in pharmacy activities that do not require the professional judgment of a pharmacist. (<http://www.acpe-accredit.org/pdf/whitePaper.pdf>)

**Program:** The overall CPE activities of an accredited provider.

**Relevant Financial Relationships:** ACPE focuses on financial relationships with commercial interest in the 12-month period preceding the time that the individual is being asked to assume a role controlling content of the CPE activity.

**Target Audience:** Individuals for whom an educational activity has been designed (e.g. pharmacists, technicians, or both).

