ACCREDITATION COUNCIL FOR PHARMACY EDUCATION

CONTINUING PHARMACY EDUCATION (CPE)

PROVIDER ACCREDITATION PROGRAM

INITIAL APPLICATION

Overview for the Preparation of the Initial Application

The Accreditation Council for Pharmacy Education (ACPE) is the national agency for accreditation of professional degree programs in pharmacy and providers of continuing pharmacy education (CPE). ACPE expanded its activities to include evaluation and certification of professional degree programs internationally in 2011 and entered into a collaboration with the American Society of Health-System Pharmacists to accredit pharmacy technician education and training programs beginning in 2014. The mission of ACPE is to assure and advance quality in pharmacy education. Accreditation is the public recognition afforded a provider of continuing pharmacy education that is judged to meet standards through initial and subsequent periodic evaluations. The ACPE accreditation process for providers of continuing pharmacy education is designed to assure pharmacists, pharmacy technicians, boards of pharmacy and others, of the quality of continuing pharmacy education activities.

There are two ways that continuing education may be offered by an organization:

1. The organization may apply to become an ACPE-accredited provider. The organization would need to submit the application following this document. If accredited, the provider would follow ACPE's policies and procedures for an ACPE-accredited provider.

2. The organization may cosponsor with an ACPE-accredited provider to offer a CPE activity. The organization may review the list of ACPE-accredited providers at www.acpe-accredit.org. The organization may contact an ACPE-accredited provider, express its desire to conduct a CPE activity and offer ACPE credit. If the ACPE-accredited provider agrees the organization must comply with the ACPE-accredited provider's procedures for cosponsorship. The organization does not need to complete the application following this document.

Eligibility Criteria to Become an ACPE-Accredited Provider:

The organization must be administratively and operationally responsible for coordinating all aspects of the CPE activities provided by the organization. In addition the organization must have been operational for a minimum of six months and have planned, implemented, and evaluated at least three (3) educational activities for health care professionals at the time of initial application. A commercial interest is not eligible for ACPE accreditation.

Organizations seeking initial accreditation are required to submit the Initial Application for Continuing Pharmacy Education (CPE) Provider Accreditation. The Initial Application must include the following items:

♦ Self-Assessment Evaluation Form (Rubric), together with supporting materials and documentation, organized into one electronic file in a commonly used digital format, such as Adobe Acrobat PDF file.

♦ Non-refundable application fee, in the form of a check. For organizations outside of the United States, please contact ACPE for application fee payment options.
   Note: If the applicant formally withdraws their application prior to the accreditation action, a portion of the application fee may be refunded at the discretion of ACPE

♦ Articles of Incorporation establishing incorporated status of the organization

♦ Organizational budget (most recent projected or actual) or auditor's statement

♦ Commercial Interest Survey (can be found in the Initial Application)

Prior to preparing the Initial Application, interested organizations should consult with ACPE staff regarding CPE provider accreditation and the application process. ACPE staff will provide instructions on electronic submission of the Application.

Review Process and Timeline:

Once the Initial Application, including all required elements, is received ACPE staff and the ACPE CPE Commission will evaluate the submission. The CPE Commission will propose accreditation actions to the ACPE Board of Directors for final action and approval at their regular Board meetings (January and June of each year). You will receive the result of this action in the form of an Action and Recommendations document soon thereafter. The notice of the action will indicate that the Board has

(1) awarded accredited provider status or
(2) denied accreditation.

Note: The granting of accreditation status to a provider does not imply recognition of that provider's satellite organizations, cooperating organizations, or divisions.

Specific Timeline:

	Spring Cycle	**Fall Cycle**
Application Deadline	February 1	September 1
Review Process	February 1 – May 1	September 1 – November 1
Commission Meeting	Mid-May	Mid-November
Board Meeting	Mid-June	Mid-January
Notification to provider	July	February
If accredited, orientation packet plus invoice for accreditation fees	July (invoice = ½ lowest annual fee)	February (invoice = lowest annual fee)
Attendance at ACPE Administrator Workshop	August - November	March - May

CPE Provider Accreditation Term:

If accreditation status is awarded, the standard term of initial accreditation is two years. During their initial term, providers are expected to respond to requests for information, report activities via the online Provider Web Tool and undergo periodic monitoring reviews to assure full compliance with ACPE's Accreditation Standards for Continuing Pharmacy Education. Providers are to submit monitoring reports addressing their performance against CPE Standards and Policies during each year of the initial accreditation term, i.e. First Review Report and Second Review Report. Accreditation beyond the initial two-year term is dependent upon submission of a satisfactory report including documentation of compliance with Standards.

It is required that the administrator will attend an ACPE Administrator's Workshop during this initial two year term. As an alternative to the live workshops, a series of instructional webinars on CPE Standards and Policies is available to the administrator and other professional staff.

Accreditation Fees:

Fees for evaluation by ACPE for purpose of initial accreditation or sustaining accreditation are set at a level intended to assist in the support and continued improvement of accreditation services. A provider that is awarded accreditation status will be invoiced for the annual evaluation and accreditation fee as set by the Board. Providers awarded accreditation status at the January Board of Directors meeting will be invoiced for the lowest annual fee amount (i.e. full year accreditation for that calendar year). Providers awarded accreditation status at the June Board of Directors meeting will be invoiced for half of the lowest annual fee amount (i.e. half-year accreditation for last six months of calendar year). Thereafter, a fee will be paid annually as long as accredited, probationary, or inactive status is maintained in accord with the Annual Activity Update (see ACPE Policy and Procedures).

Awarding Credit:

ACPE-accredited providers are expected to report all CPE activities via the online Provider Web Tool. The Provider Web Tool is a secure, web-based application designed for ACPE-accredited providers to submit Activity Description Forms and update contact information using the Provider Verification Form. A Provider Web Tool Manual is available to assist ACPE-accredited providers to submit CPE activities.

In addition, ACPE-accredited providers are required to award ACPE credit to pharmacists and pharmacy technicians by submitting participant information online via CPE Monitor™. CPE Monitor™, the collaborative service from the Accreditation Council for Pharmacy Education (ACPE) and the National Association of Boards of Pharmacy (NABP), allows CPE Providers to authenticate, store, and streamline data reporting and compliance verification for participating boards of pharmacy. The CPE tracking system creates a direct link for sending CPE data from ACPE-accredited providers to ACPE and then to NABP, ensuring that all reported CPE units are officially verified by ACPE-accredited providers.

Pharmacists and pharmacy technicians may obtain a unique identification number from NABP (www.nabp.net) to be used when registering for a CPE activity from an ACPE-accredited provider. For a given Universal Activity Number, the provider will be offered a variety of mechanisms to upload each participant's NABP e-profile ID number. After CPE units are processed by ACPE and NABP, pharmacists and pharmacy technicians will be able to login to a comprehensive electronic profile to access information about their completed CPE.

A Technical Specifications Guide is available to assist providers in the upload process for participant information. For 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 in a timely fashion.

Instructions for the Submission of your
Initial Application

Please submit the Initial Application electronically to ACPE as **<u>one</u>** file in a commonly used digital format, such as Adobe Acrobat PDF file. Materials should be arranged in the order of the Table of Contents, and appendices and supporting documentation should be included in the same file as the report.

We recommend the following method of submission:

1. Table of Contents
    a. Please list the page numbers associated with each component of the report. For example:

Table of Contents		
Components	Tab	Page(s)
Provider and Report Overview	N/A	Cover
Provider Summary Sheets	1	1-2
Commercial Interest Survey	2	3-6
Policies and Procedures Manual	3	7-25
Checklists		
Standard 1 – Goal and Mission of the CPE Program	4	26-27
Narrative, rubric and supporting materials		
CPE Goal and mission statement		

2. Clearly identify and label the included components. For example:
    a. Provider Summary Sheet
    b. Policies and Procedures
    c. Standard 1
    d. Standard 2
    e. Standard 3, etc. (through global items)

3. Clearly label all supporting documentation and place it behind the specific section or clearly cross-reference it to the appropriate location.

Preparing for evaluation for purposes of accreditation requires the submission of an in-depth and broadly-based, self-assessment document. Self-assessment documents have traditionally been submitted on paper; however, ACPE now requires electronic copies. ACPE staff has drafted the following guidelines to assist a continuing-education provider in preparing and submitting an electronic self-assessment.

Provide start-up directions: Inform the reviewer of hardware and software needed to use the self-study. Include clear directions on how to begin and provide the name, email address, and phone number of a technical contact in the event that the reviewer experiences problems. Note, the electronic report should be provided as ONE file in a commonly used digital format, such as an Adobe Acrobat PDF file.

Make all computer-based media both Macintosh and PC compatible: Reviewers will come from a variety of computing environments. Any document or application included in the self-assessment must run on both Macintosh and PC computers.

Provide required applications: Provide installers for any applications needed for reviewing the self-assessment along with the means for uninstalling the applications. Be sure to have the proper licensing agreements when distributing any application.

Facilitate in-document note taking: Use applications for presenting text-based documents that allow in-document note taking. Disable document features (e.g. Adobe Acrobat® passwords) that prevent the reviewer from taking notes.

Organize the materials for quick search and retrieval: Make information quickly and easily accessible. Provide instructions on how to navigate the report, using PDF attachments, bookmarks, and/or hyperlinks within the report to help organize and direct reviewers to the appropriate documentation. Information that is difficult to locate, separated from the main documents or embedded in several layers of menus may be overlooked by the reviewer. Appendices and supporting documentation should be included in the same file as the report. Multiple electronic files will not be accepted.

Structure documents for on-screen reading: Wherever possible, break information into screen-sized chunks that are legible at 72 DPI. Use simple navigation so that the viewer either scrolls through a document or pages through it. Avoid making the reviewer have to both scroll and page within the same document.

Facilitate printing: Ensure that documents can be printed on 8.5 x 11-inch paper while maintaining legibility and logical page breaks.

Viewing critical documents: Components that are critical to the evaluation should be visible to the reviewer. Distorted images, graphs, charts, etc. that cannot properly viewed on the reviewers' computer will not be considered in the self-assessment.

Limit web access or file downloads to optional materials: The continuing education provider should submit all information and materials that are required for the self-study. The self-assessment report should not link to documents on the Internet unless they are only supplementary.

Select the most appropriate medium for the content: If the technology gets in the way of clarity or speed, then the reviewer may overlook information or not understand your organization in detail. Use the medium that presents each piece of information in the most accurate and effective way possible.

Use computer-based video, animations and audio sparingly: Avoid using computer-based video, lengthy animations and audio except where they add to information about your organization or present the content more effectively than other methods. If these media are used, give the reviewer full control over playback including the ability to fast-forward or skip presentations.

ACPE staff will be happy to receive comments or answer questions about these guidelines or other issues. Please contact our office at (312) 664-3575 or by email at ceinfo@acpe-accredit.org.

Creating PDF Documents from Word Documents for ACPE Report Submission

If you have already created your word document then you don't need to scan the printed document, you can do the following:

1. Open your document in Word
2. Save your document as a PDF
   a. File > Save As, PDF
3. In the **File Name** list, type or select a name for the document.
4. In the **Save as type** list, click **PDF**.
5. If you want to open the file immediately after saving it, select the **View Result** check box. This check box is available only if you have a PDF reader installed on your computer.

Combining Multiple PDF Documents for ACPE Report Submission
Note: Adobe Reader is free software that allows you to view PDFs. Adobe Acrobat is software that allows you to create and edit PDFs. Adobe Acrobat is not free.

Option 1: Adobe Acrobat
1. Within Acrobat, select File > Create > Combine Files into a Single PDF.
2. Click Add Files and select the files you want to add.
3. Click, drag, and drop to reorder the files and pages. Double-click on a file to expand and rearrange individual pages. Press the Delete key to remove unwanted content.
4. When finished arranging the files, click Combine Files.
5. Select File > Save As > PDF.
6. Name your PDF file and click Save.

Option 2: Online Membership to Adobe Acrobat
1. If your organization does not currently have access to Adobe Acrobat, visit https://www.acrobat.com/free-trial-download.html to download a free trial of Acrobat Pro.
2. Download a free trial for 30 days; or purchase monthly access to Adobe Acrobat online.

Option 3: PDF Creation Software
   Download PDF creator software from the internet. (i.e., PDFCreator, CutePDF, PDF Fusion, Nitro PDF, etc.) Note: ACPE does not endorse any particular PDF Creation Software.

ACPE NEW PROVIDER SUMMARY SHEET

Per ACPE Policy, there shall be a visible, continuous and identifiable authority charged with the administration of the provider's CPE program. The administrative authority shall have the responsibility and be accountable for assuring and demonstrating compliance with the standards. The person in whom the administrative function is vested shall be qualified by virtue of background, education, training and/or experience. The CPE Administrator must have authority within the organization to assure that the ACPE standards are met.

Continuing Education Administrator (primary point of contact for ACPE-related communications and administrative items) - *REQUIRED*

Name (include prefix and suffix)	
Signature	
Title	
Address	
City/State/Zip	
Telephone	
Fax	
E-mail	

Supervisor of Applicant Organization (second point of contact for ACPE-related communications)

Name (include prefix and suffix)	
Title	
Address	
City/State/Zip	
Telephone	
Fax	
E-mail	

Background

Name of organization as it will appear on accreditation certificate	
URL Web Address	
Organization Address (if different from above)	
City/State/Zip	
Telephone	
Fax	
List other healthcare accreditations granted	
Provider Type (select <u>one</u> of the following):	
❑ College/School	
❑ Educational Company	
❑ Government Agency	
❑ Hospitals; Healthcare Network	
❑ National Associations	
❑ State or Local Associations	
❑ Other	

APPLICATION: ORGANIZATION SUMMARY SHEET

Please complete and submit at the beginning your application.

1. How long has your organization offered Continuing Education?

   _____ (number of years)

2. Do you conduct or plan to conduct CE activities for (select one):

   _____ Pharmacists only

   _____ Pharmacy technicians only

   _____ Both pharmacists and pharmacy technicians

   _____ Other _____

3. After reviewing our definition of the ACPE activity types what types

   of activities do you conduct or plan to conduct (select all that apply):

   _____ Knowledge-based (K)

   _____ Application-based (A)

   _____ Practice-based (P)

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*For your application submissions

Retrospectively define how you would have classified the selected CE activities as

-Knowledge-based (K)
-Application-based (A)
-Practice-based (P)

according to the CPE Accreditation Standards (e.g., Standards 3, 9, 10 and 12).

Note – it might be helpful to complete the entire report/rubric first and then assign the activity type at the end.

Please provide a summary description of the Provider's CPE program, including background of the organization. The summary should be no more than one page in length (12-point font, single spaced).

Please indicate the three CE activities submitted in the application:

Title	Activity Type (K, A, P)*

INITIAL APPLICATION – EVALUATION FORM (RUBRIC)
GUIDELINES

The following document is the evaluation form (rubric) for the policies and procedures, four Sections and twelve Standards of the *ACPE Accreditation Standards for Continuing Pharmacy Education*, and evaluation summary.

For each component of the report you should assess your CE program and selected activities by the following:

A. Include a narrative response with enough detailed information for reviewers to accurately assess your rubric ratings and supporting documentation.

B. Respond to EVERY question ensuring that each item in the rubric evaluation grid is addressed. If you believe that a question does not apply to your organization, please explain why. For each criterion, indicate your self-assessment rating by marking the corresponding checkbox:

- **Meets Criterion**: The provider has achieved all the elements required by the criterion.
- **Needs Improvement**: The provider has not achieved all the elements required by the criterion.
- **Additional Documents Required**: There is inadequate information in the narrative or documentation to assess whether the provider meets the criterion. For example, the provider's discussion is absent or incomplete or requested supporting documents are missing.
- **N/A - Not Applicable….**: This section of the criterion does not apply.

C. Carefully review the items in parentheses in the 'Criterion and Evidence' sections of the rubric (shaded columns on the left) to identify required supporting materials.

D. Place documentation and/or completed checklist(s) immediately after your assessment of that standard or as an appendix at the end of your report. Your documentation is the basis for ACPE's evaluation and should correspond to each of the rubric items. In the event that documentation is not available, please provide an explanation. If you are asked to provide documentation that you included in an earlier section, state the section number and/or page. Feel free to include documentation above and beyond that requested, if it adds to the understanding of your efforts.

For further questions or clarification, please contact the ACPE office at (312) 664-3575 or by email at ceinfo@acpe-accredit.org.

<h1>Commercial Interest Survey</h1>

Organizational Assessment to Determine Eligibility for Accreditation

ACPE Standards for Commercial Support and related policy do not allow a commercial interest or any entity owned or controlled by a commercial interest to be an accredited provider. The definition allows an accredited provider to be owned by a firm that is not a commercial interest. It also allows a provider to have a 'sister company' that is a commercial interest, as long as the accredited provider has and maintains adequate corporate separation (i.e. firewalls) to prohibit any influence or control by the 'sister company' over the CPE program of the accredited provider. There are no structural and organizational safeguards that could be put into place in order for an entity owned or controlled by a commercial interest to be accredited.

The follow-up survey consists of the following sections:
1. Provider – evaluation of CI definition
2. Sister Company – evaluation of the CI definition for business units that are 'parallel' to the provider (e.g. same level on the organizational chart)
3. Parent/Overall Company – evaluation of the CI definition for business units that are 'higher' to the provider (e.g. any business unit higher than the provider on the organizational chart)

Background

Organizational Assessment to Determine Eligibility for Accreditation

ACPE Standards for Commercial Support and related policy do not allow a commercial interest or any entity owned or controlled by a commercial interest to be an accredited provider.

The definition allows an accredited provider to be owned by a firm that is not a commercial interest. It also allows a provider to have a 'sister company' that is a commercial interest, as long as the accredited provider has and maintains adequate corporate separation

(i.e. firewalls) to prohibit any influence or control by the 'sister company' over the CPE program of the accredited provider. There are no structural and organizational safeguards that could be put into place in order for an entity owned or controlled by a commercial interest to be accredited.

The follow-up survey consists of the following sections:

1. Provider – evaluation of CI definition
2. Sister Company – evaluation of the CI definition for business units that are 'parallel' to the provider (e.g. same level on the organizational chart)
3. Parent/Overall Company – evaluation of the CI definition for business units that are 'higher' to the provider (e.g. any business unit higher than the provider on the organizational chart)

To assess your organization's eligibility for accreditation, please complete the survey as directed.

*1. A 'commercial interest' is any entity producing, marketing, reselling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical service directly to patients are <u>not</u> 'commercial interests.'

Based on the definition above, is <u>your organization</u> (ACPE-accredited provider) considered to be a commercial interest?

□ **No** – Not a commercial interest
□ **Yes** – it is a commercial interest
□ Uncertain

*2. Please describe the rationale for your response above.

∗3. A 'commercial interest' is any entity producing, marketing, reselling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical service directly to patients are not 'commercial interests.'

Based on the definition above, are any of your <u>sister companies</u> considered to be a commercial interest?

- ☐ **No** – not a commercial interest
- ☐ **Yes** – is a commercial interest
- ☐ Uncertain
- ☐ Not applicable

*4. Please describe the rationale for your response above.

Parent/Overall Organization

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

Based on the definition above, is your <u>parent company or larger organization</u> considered to be a commercial interest?

- ☐ **No** – not a commercial interest
- ☐ **Yes** – is a commercial interest
- ☐ Uncertain
- ☐ Not applicable

*6. Please list and describe any other companies/organizations (e.g. parent or higher organizations) that the CPE provider either directly or indirectly reports to in the following format: Name of company/organization; business purpose

If you are uncertain of your organization's eligibility based on the survey, please contact the ACPE office at (312) 664-3575 prior to completing the application materials.

Policy and Procedure Monitoring

ACPE Policies and Procedures*
Section V - CPE Operations Policies and Procedures

Please review the most current *ACPE Continuing Pharmacy Education Provider Accreditation Program Policies and Procedures Manual: A Guide for ACPE-accredited Providers* posted on the ACPE website (www.acpe-accredit.org). The organization is asked to submit a policies and procedures manual defining the organization's processes to implement the policies and procedures and CPE Standards.

The following list identifies the selected policies and procedures that relate to operational requirements for CPE activities.

Policies & Procedures – Section V	Meets Criterion	Needs Improvement

1.0 CPE Administrator
    1a. Responsibilities
    1b. Administrative Change
	Meets requirements	Needs Improvement ☐
		or Additional Docs Required ☐

2.0 CPE Activities
    2a. Knowledge-based (K)
    2b. Application-based (A)
    2c. Practice-based (P)
		Needs Improvement ☐
		or Additional Docs Required ☐

3.0 Cosponsorship		Needs Improvement ☐ or Additional Docs Required ☐

4.0 CPE Activity Announcement Literature**
    4a. Activity Announcement Materials
    (formerly program announcement materials)
    4b. Multiday conference brochures**
	All of the selected activity announcements contain all required elements as measured by the Monitoring of Activity Announcements checklist.
	
	Or, at least one recent activity announcements contained all required elements as measured by the activity announcement checklist.
	
	Meets for All ☐
	or Meets for at Least One ☐
		Every selected activity announcement is missing at least one required element as measured by the activity announcement checklist.
		
		Needs Improvement ☐
		or Additional Docs Required ☐

5.0 Continuing Education Credit
    5a. Live CPE activities
    5b. Home study CPE activities
    5c. Partial credit
	Meets requirements	Needs Improvement ☐
		or Additional Docs Required ☐

6.0 Recordkeeping		Needs Improvement ☐ or Additional Docs Required ☐
7.0 Awarding CPE Credit		Needs Improvement ☐ or Additional Docs Required ☐
8.0 Financial Resources		Needs Improvement ☐ or Additional Docs Required ☐

9.0 Provider Web Tool
    9a. Change in Administrator
    9b. Activity Description Forms (ADF)
      (formerly Program Description Forms)
    9c. Universal Activity Numbers (UAN)
      (formerly Universal Program Numbers)
    9d. Annual Activity Update
		Needs Improvement ☐
		or Additional Docs Required ☐

Policies & Procedures – Section V	Meets Criterion	Needs Improvement
10.0 Fees		Needs Improvement ☐ or Additional Docs Required ☐
11.0 Organization Name Change or Merger		Needs Improvement ☐ or Additional Docs Required ☐

**Additional Materials: please see the following pages for directions and requirements for P&P 4.0 & 7.0.

If the rating is Needs Improvements, briefly explain the rationale (use additional sheets if needed):

*Terminology: This document will use the phrase 'pharmacists and technicians' as the recipients for CPE activities. Please note that it is acceptable for some providers to design CPE activities for pharmacists only; to design CPE activities for pharmacy technicians only; and, for some providers to design CPE activities for both pharmacists and pharmacy technicians.

Policy and Procedure 4.0 - Monitoring
Activity Announcements Checklist

Directions:
Applicants: Please provide a mock-up announcement of a CE activity. (1) Please indicate with a check mark (✓) in the grid below if the required items are included on the activity announcement along with any additional explanatory comments (if needed) **AND** (2) physically identify and label each of the items on the submitted activity announcements.

Reviewers: please evaluate the applicant's self-assessment by verifying the items listed below against the submitted activity announcements.

Activity Announcements Required Items	CPE Activity A	CPE Activity B	CPE Activity C
A. Objectives; verbs must elicit or describe observable or measurable behaviors on the part of participants. (Avoid "understand," "learn," etc.)*			
B. Type of activity, i.e. knowledge, application, practice*			
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: "The [name of accredited provider] is accredited by the Accreditation Council for Pharmacy Education as a provider of continuing pharmacy education." (Optional: listing the ACPE-accredited or non-accredited co-sponsor - if applicable)			
I. The ACPE Universal Activity Number assigned to the activity			
J. The appropriate target audience designation ('P' and/or 'T') in the activity UAN			
K. 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 that have been designed as a track, etc.).			
L. Acknowledgment of any organization(s) providing financial support for any component of the educational activity			
M. For home study activities: the initial release date and the expiration date.			

*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.'

Section I: Content of Continuing Pharmacy Education Activities

STANDARD 1: Goal and Mission of the CPE Program

The provider must develop a CPE goal and mission statement that defines the basis and intended outcomes for the majority of educational activities the provider offers.

Criterion and Evidence	Meets Criterion	Needs Improvement
Defining the Basis and Outcomes for Activities (Attach CPE goal and mission statement)	The provider has a CPE goal and mission statement that defines the basis and intended outcomes for the majority of educational activities. Meets ☐	The provider has no CPE goal or mission statement that defines the basis and intended outcomes for the majority of educational activities. Needs Improvement ☐ or Additional Docs Required ☐
CPE Goals for Pharmacists	The CPE goal concisely states how the provider will assist pharmacists to maintain and enhance their professional competencies to practice in various settings. Meets ☐ or N/A (CPE not offered for pharmacists) ☐	The CPE goal does not state how the provider will assist pharmacists to maintain and enhance their professional competencies to practice in various settings. Needs Improvement ☐ or Additional Docs Required ☐
CPE Goals for Technicians	The CPE goal concisely states how the provider will assist technicians to maintain and enhance their professional competencies to practice in various settings. Meets ☐ or N/A (CPE not offered for technicians) ☐	The CPE goal does not state how the provider will assist technicians to maintain and enhance their professional competencies to practice in various settings. Needs Improvement ☐ or Additional Docs Required ☐
Mission Statement	The CPE mission statement is consistent with the goals, indicates the provider's short-term intent in conducting CPE activities, includes the intended audience and includes the scope of activities. Meets ☐	The CPE mission statement is not consistent with the goals; or it does not indicate the provider's short-term intent in conducting CPE activities, the intended audience or the scope of activities. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

STANDARD 2: Educational Needs Assessment

The provider must develop CPE activities based on a multifaceted process where educational needs are prospectively identified.

Criterion and Evidence	Meets Criterion	Needs Improvement
Educational Needs Assessment for <u>Pharmacists</u> (Attach examples of needs assessment instruments and/or participant needs-assessment surveys with summaries of assessment data.)	The provider includes the identification of educational needs as one of the several procedures for developing CPE activities.* Meets ☐ or N/A (CPE not offered for pharmacists) ☐	The provider does not identify learners' educational needs. Needs Improvement ☐ or Additional Docs Required ☐
Educational Needs Assessment for <u>Technicians</u> (Attach examples of needs assessment instruments and/or participant needs-assessment surveys with summaries of assessment data.)	The provider includes the identification of educational needs as one of the several procedures for developing CPE activities.* Meets ☐ or N/A (CPE not offered for technicians) ☐	The provider does not identify learners' educational needs. Needs Improvement ☐ or Additional Docs Required ☐
Advanced Planning (Attach a description of how needs assessments findings are prospectively linked to the activities offered.)	Needs assessment is completed before planning specific CPE activities to guide content development and delivery. Meets ☐	Needs assessment is not done in advance of planning CPE activities or does not guide content development or delivery. Needs Improvement ☐ or Additional Docs Required ☐
Multiple Assessment Strategies	Needs assessments employ multiple strategies to identify the specific gaps in knowledge or skills or areas for enhancement for the participant's competence. Meets ☐	The provider uses limited or non-specific needs assessment strategies. Needs Improvement ☐ or Additional Docs Required ☐
Gap Analysis (Attach evidence of gaps identified by needs assessment with the requested documentation.)	The provider identifies gaps between what participants do and what is needed and desired in practice. Meets ☐	The provider does not identify gaps between what participants do and what is needed or desired in practice. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed)

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* E.g., periodic surveys of the targeted audience(s); use of an advisory/planning committee which includes representative members of the intended target audience(s); items on the activity evaluation forms to solicit a participant's suggestions for future topics; review of the professional literature and trends in the profession, or, audits of professional practice to identify areas in need of strengthening.

STANDARD 3: Continuing Pharmacy Education Activities

The provider must structure each CPE activity to meet the knowledge-, application and/or practice-based educational needs of pharmacists and technicians.

Criterion and Evidence	Meets Criterion	Needs Improvement
Activities Structured by Type for <u>Pharmacists</u> (Attach the policy and procedure or describe the process used to assign K, A, P activity-type designators.)	The provider structures each CPE activity to meet the knowledge-, application-and/or practice-based educational needs of pharmacists. Meets ☐ or N/A (CPE not offered for pharmacists) ☐	The provider does not have a structured process to assign each CPE activity to meet the knowledge-, application-and/or practice-based educational needs of pharmacists. Needs Improvement ☐ or Additional Docs Required ☐
Activities Structured by Type for <u>Technicians</u> (Attach the policy and procedure or describe the process used to assign K, A, P activity-type designators.)	The provider structures each CPE activity to meet the knowledge-, application-and/or practice-based educational needs of technicians. Meets ☐ or N/A (CPE not offered for technicians) ☐	The provider does not have a structured process to assign each CPE activity to meet the knowledge-, application-and/or practice-based educational needs of technicians. Needs Improvement ☐ or Additional Docs Required ☐
Knowledge-based Activities		
Knowledge-based CPE Purpose	Knowledge-based CPE activities are designed primarily for participants to acquire factual knowledge. Meets ☐ or N/A (Knowledge-based CPE is not offered) ☐	CPE activities that have been labeled as Knowledge-based are not designed primarily for participants to acquire factual knowledge. Needs Improvement ☐ or Additional Docs Required ☐
Knowledge-based CPE Credit (Attach activity announcement)	The minimum credit for Knowledge-based CPE is 15 minutes or 0.25 contact hour. Meets ☐ or N/A (Knowledge-based CPE is not offered) ☐	The provider incorrectly assigns credit to a Knowledge-based CPE activity or misidentifies it as Knowledge-based CPE when it is not. Needs Improvement ☐ or Additional Docs Required ☐
Application-based Activities		
Application-based CPE Purpose	Application-based CPE activities are designed primarily for participants to apply the information learned in the allotted timeframe. Meets ☐ or N/A (Application-based CPE not offered) ☐	CPE activities that have been labeled as Application-based are not designed primarily for participants to apply the information learned in the allotted timeframe. Needs Improvement ☐ or Additional Docs Required ☐
Application-based CPE Credit (Attach activity announcement)	The minimum credit for Application-based CPE is 60 minutes or one contact hour. Meets ☐ or N/A (Application-based CPE not offered) ☐	The provider incorrectly assigns credit to an Application-based CPE activity or misidentifies it as Application-based CPE when it is not. Needs Improvement ☐ or Additional Docs Required ☐
Practice-based Activities		
Practice-based CPE Purpose (Attach syllabus or describe how Practice-based activities are designed to meet the listed requirements.)	Practice-based CPE activities are designed primarily for participants to systematically acquire specific knowledge, skills, attitudes, and performance behaviors that expand or enhance practice competencies. Meets ☐ or N/A (Practice-based CPE offered) ☐	CPE activities that have been labeled as Practice-based are not designed primarily for participants to systematically acquire specific knowledge, skills, attitudes, and performance behaviors that expand or enhance practice competencies. Needs Improvement ☐ or Additional Docs Required ☐

Practice-based CPE Components	Practice-based CPE activities include a didactic component and a practice component. Meets ☐ or N/A (Practice-based CPE not offered) ☐	Practice-based CPE activities do not include both a didactic component and a practice component. Needs Improvement ☐ or Additional Docs Required ☐
Practice-based CPE Minimum Credit (Attach activity announcement)	The minimum credit for Practice-based CPE is 15 contact hours. Meets ☐ or N/A (Practice-based CPE not offered) ☐	The provider incorrectly assigns credit to a Practice-based CPE activity or misidentifies it as Practice-based CPE when it is not. Needs Improvement ☐ or Additional Docs Required ☐
All Activities		
The Evidence Base for CPE (Describe the process for ensuring the information presented is evidence-based. Include any relevant evidence.)	The content of the provider's CPE activities is based on evidence as accepted in the literature by the healthcare professions. Meets ☐	The content of the provider's CPE activities is not based on evidence as accepted in the literature by the healthcare professions. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

STANDARD 4: CPE Activity Objectives

The provider must develop objectives for each CPE activity that define what the pharmacists and technicians should be able to do at the completion of each CPE activity.

Criterion and Evidence	Meets Criterion	Needs Improvement
Requirement for CPE Objectives (Attach activity announcements.)	The provider develops objectives for each CPE activity. Meets ☐	The provider does not have objectives for each CPE activity. Needs Improvement ☐ or Additional Docs Required ☐
Objectives Note: Verbs for objectives must elicit or describe observable or measurable behaviors on the part of activity participants. (See sample list of terms)	Objectives are measurable and specific. Meets for All Activities☐ or Meets for at Least One Activity ☐	Objectives are consistently non-measurable and non-specific. Needs Improvement ☐ or Additional Docs Required ☐
Objectives for Pharmacists		
Type of Activity Note: Refer to the description of activity types in Standard 3.	The objectives are appropriate for the activity-type selected (Knowledge, Application or Practice-based) for what a pharmacist will be able to do at the completion of the activity. Meets ☐ or N/A (CPE not offered for pharmacists) ☐	The objectives are inappropriate for the activity-type selected (Knowledge, Application or Practice-based) for what a pharmacist will be able to do at the completion of the activity. Needs Improvement ☐ or Additional Docs Required ☐
Content of Activity Note: Refer to the Definition of Pharmacy (Standard 1) and associated appendices for guidance on suitable content.	The objectives relate to content that is appropriate for a pharmacist. Meets ☐ or N/A (CPE not offered for pharmacists) ☐	The objectives relate to content that is not appropriate for a pharmacist. Needs Improvement ☐ or Additional Docs Required ☐
Objectives for Technicians		
Type of Activity Note: Refer to the description of activity types in Standard 3.	The objectives are appropriate for the activity-type selected (Knowledge, Application or Practice-based) for what a technician will be able to do at the completion of the activity. Meets ☐ or N/A (CPE not offered for technicians) ☐	The objectives are inappropriate for the activity-type selected (Knowledge, Application or Practice-based) for what a technician will be able to do at the completion of the activity. Needs Improvement ☐ or Additional Docs Required ☐
Content of Activity Note: Refer to the Definition of Pharmacy (Standard 1) and associated appendices for guidance on suitable content.	The objectives relate to content that is appropriate for a technician. Meets ☐ or N/A (CPE not offered for technicians) ☐	The objectives relate to content that is not appropriate for a technician. Needs Improvement ☐ or Additional Docs Required ☐
Objectives Address Educational Need (Attach evidence of how objectives are developed to address the identified educational need.)	The objectives are developed to specifically address the identified educational need (Standard 2) and the activity type. Meets ☐	The objectives do not address the identified educational need or the activity type. Needs Improvement ☐ or Additional Docs Required ☐
Objectives Matched to Active-Learning Activity (Attach evidence of how objectives are addressed by active learning.)	In general, the objectives are addressed by an active learning activity (Standard 7). Meets ☐	The objectives are not addressed by an active learning activity. Needs Improvement ☐ or Additional Docs Required ☐

Objectives Are Assessed (Attach evidence of how objectives are covered by a learning assessment.)	In general, the objectives are covered by a learning assessment (Standard 9). Meets ☐	The objectives are not covered by a learning assessment. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

Relative to taxonomies of learning, ACPE CPE activities will fall along a continuum of learning, starting at Knowledge, moving through Application, and ending at Practice. Learning across this continuum will generally progress from being more cognitive, theoretical and shallow at the knowledge end to becoming more practical, applied and deep at the practice end, including additional elements from psychomotor and affective domains that emphasize the systematic application of content, skills and attitudes to real-life practice.
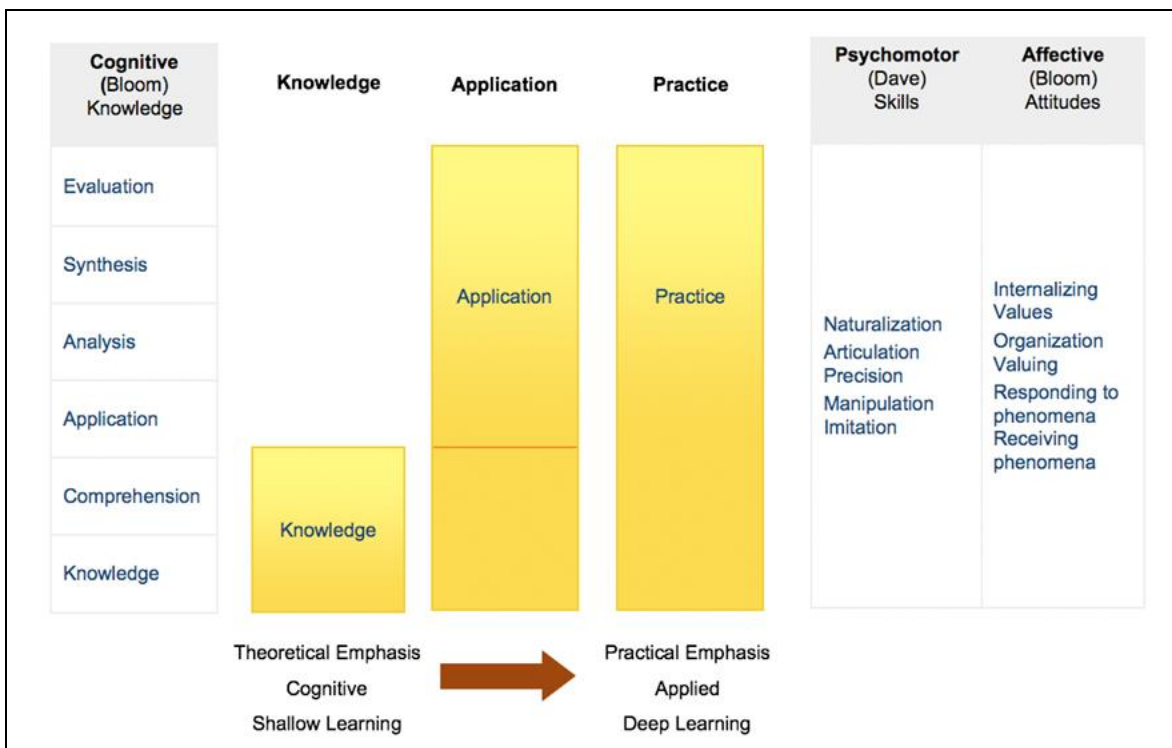
Suggested Verbs for CPE Activities by Domain

Cognitive Domain (Bloom)	
Evaluation	To appraise, argue, assess, attach, choose compare, defend estimate, judge, predict, rate, core, select, support, value, evaluate.
Synthesis	To arrange, assemble, collect, compose, construct, create, design, develop, formulate, manage, organize, plan, prepare, propose, set up, write.
Analysis	To analyze, appraise, calculate, categorize, compare, contrast, criticize, differentiate, discriminate, distinguish, examine, experiment, investigate, question, research, test.
Application	To apply, choose, demonstrate, dramatize, employ, illustrate, interpret, operate, practice, schedule, sketch, solve, use, write.
Comprehension	To classify, describe, discuss, explain, express, identify, indicate, locate, outline, recognize, report, restate, review, select, translate,
Knowledge	To arrange, define, duplicate, label, list, memorize, name, order, recognize, relate, recall, repeat, reproduce, state.

Psychomotor Domain[1] (Dave)	
Naturalization	To design, specify, manage, invent, and project-manage.
Articulation	To construct, solve, combine, coordinate, integrate, adapt, develop, formulate, modify, master, improve, and teach.
Precision	To demonstrate, complete, show, perfect, calibrate, control, and practice.
Manipulation	To re-create, build, perform, execute, and implement.
Imitation	To copy, follow, replicate, repeat, adhere, observe, identify, mimic, try, reenact, and imitate.

Affective Domain[2] (Bloom)	
Internalizing Values (Characterization)	To act, discriminate, display, influence, listen, modify, perform, practice, propose, qualify, question, revise, serve, solve, verify.
Organization	To adhere, alter, arrange, combine, compare, complete, defend, explain, formulate, generalize, identify, integrate, modify, order, organize, prepare, relate, synthesize.
Valuing	To complete, demonstrate, differentiate, explain, follow, form, initiate, invite, join, justify, propose, read, report, select, share, study, work.
Responding to Phenomena	To answer, assist, aid, comply, conform, discuss, greet, help, label, perform, practice, present, read, recite, report, select, tell, write.
Receiving Phenomena	To ask, choose, describe, follow, give, hold, identify, locate, name, points to, select, sit, erect, reply, use.

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[1] Dave, R. H. (1975). *Developing and Writing Behavioural Objectives.* (R J Armstrong, ed.) Educational Innovators Press.
[2] Krathwohl, D. R., Bloom, B. S., & Masia, B. B. (1973). *Taxonomy of Educational Objectives, the Classification of Educational Goals. Handbook II: Affective Domain.* New York: David McKay Co., Inc.

STANDARD 5: Standards for Commercial Support

The provider must plan all CPE activities independent of commercial interest. The educational content must be presented with full disclosure and equitable balance.

Appropriate topics and learning activities must be distinguished from topics and learning activities which are promotional or appear to be intended for the purpose of endorsing either a specific commercial drug, device or other commercial product (as contrasted with the generic product/drug entity and its contents or the general therapeutic area it addresses), or a specific commercial service (as contrasted with the general service area and/or the aspects or problems of professional practice it addresses).

Criterion and Evidence	Meets Criterion	Needs Improvement
Independence in planning and delivery of CPE activities		
Independence [SCS 5.1 (a)] (Include policies and procedures and grant agreements)	The provider has policies and procedures to ensure that the planning, implementation and evaluation of educational activities are done without the influence or control of the commercial interest. Meets ☐	The provider allows commercial interests to influence planning, implementation or evaluation of educational activities. Needs Improvement ☐ or Additional Docs Required ☐
Independence [SCS 5.1(b)] (Include policies and procedures, activity announcement and grant agreements)	The provider does not use commercial interests to cosponsor continuing education activities. Meets ☐	The provider uses commercial interests to cosponsor continuing education activities. Needs Improvement ☐ or Additional Docs Required ☐
Resolve conflicts of interest during the planning process		
Conflict of Interest - Identification [SCS 5.2 (a)] [Include evidence of disclosure (e.g. completed forms)]	The provider obtains disclosure of relevant financial relationships from everyone in a position to influence a CPE activity. Meets ☐	The provider does not obtain disclosure of relevant financial relationships from everyone in a position to influence a CPE activity. Needs Improvement ☐ or Additional Docs Required ☐
Conflict of Interest - Disqualification [SCS 5.2 (b)] (Include policies and procedures)	The provider has policies and procedures to ensure that if an individual refuses to disclose relevant financial relationships, they are disqualified from any involvement with the CE activity. Meets ☐	The provider does not have a mechanism to disqualify individuals if they refuse to disclose relevant financial relationships. Needs Improvement ☐ or Additional Docs Required ☐
Conflict of Interest - Resolution [SCS 5.2 (c)] (Include policy and activity file documentation)	The provider has a mechanism to resolve conflicts of interest and documents the resolution prior to delivery of the educational activity. Meets ☐	The provider does not have a mechanism or does not document resolution for each educational activity. Needs Improvement ☐ or Additional Docs Required ☐
Prospectively identify and use commercial support appropriately		
Budgetary Considerations – Commercial Support [SCS 5.3 (a,b,c)] (Include policies and procedures)	The provider makes all decisions regarding the disposition and disbursement of commercial support without any influence or stipulation from commercial interests. Meets ☐	The provider allows the commercial interest(s) to influence decisions regarding the disposition and disbursement of commercial support. Needs Improvement ☐ or Additional Docs Required ☐

Appropriate Use of Commercial Support [SCS 5.3 (d,e,f)] (Include income and expense statements for requested commercially-supported activities)	The provider uses written, signed (by the provider and commercial interest) and dated agreements that specify the terms, conditions and purpose of the support; and the provider documents that the provider retains responsibility for the administration, content, quality, and integrity of all educational activities. Meets ☐	The provider does not use written agreements when external support is obtained or the agreements do not document that the provider retains responsibility for the administration, content, quality, and integrity of all continuing pharmacy education activities. Needs Improvement ☐ or Additional Docs Required ☐
Budgetary Expenditures – Commercial Support [SCS 5.3 (g,h,i,j,l,m)] (Include policies and procedures)	The provider has written policies and procedures for handling and documenting expenditures including: 1. Payment of honoraria, travel, reimbursement and other expenses for planners, teachers and authors. 2. Direct payment of honoraria or reimbursement to teachers or authors is done by the provider or designee and not by the commercial interests. 3. Refusal to accept other payment(s) for a supported activity by anyone involved in the development or implementation of the educational activity. 4. Honoraria and expenses are to be paid only for the teacher's or author's work in the educational activity. 5. Honoraria and expenses may not be provided to learners or other non-faculty/ non-author participants. 6. Accurate documentation of commercial support received and expended must be kept and produced upon request. Meets ☐	The provider does not have written policies and procedures for handling and documenting expenditures. Needs Improvement ☐ or Additional Docs Required ☐
Appropriate Use of Commercial Support [SCS 5.3 (k)] (Include activity announcement)	The provider does not schedule social events or serve meals during the educational activity. Meets ☐	Social events or serving of meals occurs during the educational activity. Needs Improvement ☐ or Additional Docs Required ☐
Manage commercial promotion appropriately		
Appropriate Management of Commercial Promotion [SCS 5.4 (b)] (Include activity announcement, educational materials, evaluation comments)	CE activities do not contain promotion or advertisement of product-specific information. Meets ☐	The CE activities contain product-specific promotion or advertisement. 1. Print – interleafed within the pages of the activity 2. Computer-based – visible on the screen at the same time as the activity 3. Audio/video recordings – present and or 'commercial breaks' 4. Live – displayed, distributed or verbalized Needs Improvement ☐ or Additional Docs Required ☐
Appropriate Management of Commercial Support [SCS 5.4 (c)] (Include educational materials)	Educational materials do not promote any advertising, trade names or a product-group message. Meets ☐	Educational materials contain advertising, trade names or a product-group message. Needs Improvement ☐ or Additional Docs Required ☐

Policies and Procedures [SCS 5.4(x)]
 	
(Include policies and procedures)
	The provider has policies and procedures for the following:
	
	    5.4(a) – arrangements for commercial exhibits or advertisements may not influence planning, interfere with presentation or be a condition of commercial support for CE activities.
	
	    5.4(b) – providers may not allow representatives of commercial interests to engage in sales or promotion during educational activities.
	
	    5.4(d) – non-educational materials may contain product promotion or product-specific advertisements.
	
	    5.4(e) – commercial interest may not provide CPE activities to learners (e.g., distribution of self-study activities or arranging for electronic access for internet activities).
	
	Meets ☐
		The provider does not have policies and procedures for the specified SCS guidelines.
		
		Needs Improvement ☐
		or Additional Docs Required ☐

Content and format delivered without commercial bias		
Content – Commercial Bias [SCS 5.5 (a,b)] (Include educational materials)	The content or format does not promote a specific proprietary business interest of a commercial interest, gives balanced views of therapeutic options, and favors the use of generic names over trade names. If trade names are used, they accompany the respective generic names and include all available trade names for the product. Meets ☐	The content or format promotes a specific proprietary business interest of a commercial interest, gives un-balanced views of therapeutic options or uses trade names for single product(s) or from specific companies. Needs Improvement ☐ or Additional Docs Required ☐
Disclose required information		
Disclosure to Participants [SCS 5.6 (a,b,c,d,e)] (Include policy and activity file documentation)	The provider must disclose (verbally or in writing) the following prior to the beginning of each educational activity: 1. Name of the individual; 2. Name of the commercial interest(s) a. including a statement of disclosure if no relevant financial relationship(s) exist; 3. Nature of the relationship the person has with each commercial interest; 4. Source of all support from commercial interests who supplied financial grants or 'in-kind' support for the CE activity Meets ☐	Provider does not disclose sources of external support, real or potential conflicts of interest on the part of the faculty. Needs Improvement ☐ or Additional Docs Required ☐
Monitoring (Include activity evaluation forms – Standard 11)	The provider's survey questions (e.g. on activity-evaluation forms) allow participants to give details on sources of commercial bias if found in an activity. Meets ☐	The provider does not evaluate whether commercial bias is present in activities or does not solicit additional information about any commercial bias found. Needs Improvement ☐ or Additional Docs Required ☐

| Appropriate Management of Commercial Promotion [SCS 5.4 (b)]

(Include a summary of activity evaluation question(s) and free-text comments – Standard 11) | No/minimal comments regarding the perception of commercial bias, advertising or promotion of commercial products are reported on participant activity evaluations and the provider follows-up to addresses any comments if identified.

Meets ☐ | Substantial comments regarding the perception of bias, advertising or promotion of commercial products are reported on participant activity evaluations or the provider does not follow-up or address the identified comments.

Needs Improvement ☐
or Additional Docs Required ☐ |

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

Section II: Delivery of CPE Activities

STANDARD 6: Faculty

The provider must communicate and collaborate with CPE activity faculty regarding the identified educational needs, intended audience, objectives, active participation, and learning assessments for each CPE activity.

Criterion and Evidence	Meets Criterion	Needs Improvement
Faculty Selection	Faculty members are selected on their knowledge of the subject matter [by the time of the CPE activity]; experience and teaching ability; and ability to meet the educational needs of the learners. Meets ☐	Faculty members are selected based on convenience or ability to draw a large audience rather than knowledge of the subject matter, experience and teaching ability; or ability to meet the educational needs of the participants. Needs Improvement ☐ or Additional Docs Required ☐
Faculty Support Guidance (Attach a description of verbal guidance along with written guidance documents.♦)	The provider communicates, collaborates and assists faculty regarding the identified educational needs, developing material and handouts and engages faculty in a dialogue giving verbal and written guidance. Meets ☐	The provider gives little information to assure that the faculty member will be an effective educator. Little or no written faculty guidance is given aside from acceptance letters and activity logistics. Needs Improvement ☐ or Additional Docs Required ☐
Faculty Guidance for Objectives	Verbal and written information is provided to faculty to assure that CPE activities meet ACPE's Standards for developing objectives. Meets ☐	The provider gives little information to educate and assure that the faculty member will develop specific and appropriate objectives. Little or no written faculty guidance is given aside from acceptance letters and activity logistics. Needs Improvement ☐ or Additional Docs Required ☐
Faculty Guidance for Learning Assessment	Verbal and written information is provided to faculty to assure that CPE activities meet ACPE's Standards for incorporating appropriate assessments of learning into CPE activities. Meets ☐	The provider gives little information to educate and assure that the faculty member will provide appropriate and constructive feedback to learners. Little or no written faculty guidance is given aside from acceptance letters and activity logistics. Needs Improvement ☐ or Additional Docs Required ☐
Faculty Guidance for Active Learning	Verbal and written information is provided to faculty to assure that CPE activities meet ACPE's Standards for incorporating active learning opportunities into CPE activities. Meets ☐	The provider gives little information to educate and assure that the faculty member will incorporate active learning techniques. Little or no written faculty guidance is given aside from acceptance letters and activity logistics. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

♦ Written guidance 1) includes administrative information (letters of agreement, disclosure and non-commercialism forms, information about activity logistics, etc.); 2) describes the characteristics of the audience; 3) explains faculty's role in assuring that activities meet ACPE's expectations for developing performance objectives, active learning, learner assessment and feedback, etc.; and 4) promotes effective educational practice with articles and readings on teaching and learning, and on developing and incorporating active-learning exercises and learning assessments into activities.

STANDARD 7: Teaching and Learning Methods

The provider must assure that all CPE activities include active participation and involvement of the pharmacist and technician.

Criterion and Evidence	Meets Criterion	Needs Improvement
Active Participation in Live CPE (Attach a description of what is done to foster active participation of learners and include examples of actual learning materials.)	The provider designs and implements learning activities to foster active participation as a component of <u>live</u> CPE instructional approaches using a variety of techniques including pre- and post-testing, quizzes, case studies, simulation exercises, problem-solving, group discussion, etc. Meets ☐ or N/A (live CPE not offered) ☐	<u>Live</u> CPE activities present information with few structured opportunities for the participants to interact with each other, with the faculty, or work with the information for the purpose of clarification, additional learning, practicing what they are learning, or evaluating whether they have met activity objectives. Needs Improvement ☐ or Additional Docs Required ☐
Active Participation in Home-Study CPE	The provider designs and implements learning activities to foster active participation as a component <u>home-study</u> CPE instructional approaches using a variety of techniques including pre- and post-testing, quizzes, case studies, simulation exercises, problem-solving, etc. Meets ☐ or N/A (home study CPE not offered) ☐	<u>Home study</u> CPE activities present information with few structured opportunities for the participants to work with the information for the purpose of clarification, additional learning, practicing what they are learning, or evaluating whether they have met activity objectives. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

STANDARD 8: Educational Materials

The provider must offer educational materials for each CPE activity that will enhance participants' understanding of the content and foster applications to pharmacy practice.

Criterion and Evidence	Meets Criterion	Needs Improvement
Educational Materials for Each CPE Activity (Attach educational materials from the activities.)	The provider offers educational materials (e.g., handouts, outlines, background material, selected bibliographies, audiovisual aids, etc.) for each CPE activity. Meets ☐	Handouts are not offered for each CPE activity. Needs Improvement ☐ or Additional Docs Required ☐
Educational Materials for Achieving Objectives	The educational materials enhance participants' ability to achieve the performance objectives; foster application to pharmacy practice; serve as guidance; provide additional sources of information; and include reference tools useful in practice. Meets ☐	The educational materials are unlikely to enhance participants' ability to achieve the performance objectives; are unlikely to foster application to pharmacy practice; do not serve as guidance; do not provide additional sources of information; or do not include reference tools useful in practice. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

Section III: ASSESSMENT

STANDARD 9: Assessment of Learning

The provider in collaboration with faculty must include learning assessments in each CPE activity to allow pharmacists and technicians to assess their achievement of the learned content. Completion of a learning assessment is required for CPE credit.

Criterion and Evidence	Meets Criterion	Needs Improvement
Learning Assessment Required (Attach a description of how participants are evaluated on activity objectives and include learning assessments with participant results.)•	The provider and faculty include learning assessments in each CPE activity for participants to assess the content learned. Meets ☐	The provider does not use a mechanism to allow all participants to assess the content learned. Or the assessment questions ask participants whether they have met objectives rather than directly testing their knowledge. Needs Improvement ☐ or Additional Docs Required ☐
Learning Assessment Required for Credit (Attach a description of how learning assessments are documented for credit.)	Participants complete a learning assessment for CPE credit. Meets ☐	The provider does not use a learning assessment as the basis for awarding CPE credit. Needs Improvement ☐ or Additional Docs Required ☐
Learning Assessment for Knowledge-based CPE	Knowledge-based CPE activities include assessment questions to determine recall of facts. Meets ☐ or N/A (Knowledge-based CPE is not offered) ☐	Knowledge-based CPE activities do not include assessment questions to determine recall of facts. Needs Improvement ☐ or Additional Docs Required ☐
Learning Assessment for Application-based CPE	Application-based CPE activities include case studies structured to address application of the principles learned. Meets ☐ or N/A (Application-based CPE not offered) ☐	Application-based CPE activities lack case studies structured to address application of the principles learned. Needs Improvement ☐ or Additional Docs Required ☐
Learning Assessment for Practice-based CPE	Practice-based CPE activities include formative and summative assessments that demonstrate that the participants achieved the stated objectives. Meets ☐ or N/A (Practice-based CPE not offered) ☐	Practice-based CPE activities lack formative and summative assessments that demonstrate that the participants achieved the stated objectives. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

• The provider may select formal and informal techniques for assessment of learning. Informal techniques typically involve participant discussions. Formal techniques, such as tests and quizzes, are typically individualized, written, and graded.

STANDARD 10: Assessment Feedback

The provider must ensure learner assessment feedback is provided to participants in an appropriate, timely, and constructive manner.

Criterion and Evidence	Meets Criterion	Needs Improvement
Appropriate, Constructive Feedback to Learners (Attach a description with examples of how feedback is provided to participants.)	Learner assessment feedback is provided to participants in an appropriate and constructive manner. Meets ☐	Learner assessment feedback is not provided to participants in an appropriate or constructive manner. For example, faculty or teaching materials prompt students with the correct answers for the purpose of passing the test rather than learning and applying the material. (e.g., a presenter saying, "... this concept is REALLY important and you might see it again, SOON.") Opportunities to cheat are present. (e.g., giving answers to questions before post tests are collected.) Needs Improvement ☐ or Additional Docs Required ☐
Timely Feedback to Learners	Learner assessment feedback is provided to participants in a timely manner. Meets ☐	Learner assessment feedback is not provided to participants in a timely manner. Needs Improvement ☐ or Additional Docs Required ☐
Feedback to Learners Consistent with objectives and CPE Type	Learner feedback is consistent with the objectives and activity type. For example, feedback may include • the correct response to questions for Knowledge-based CPE; • correct evaluation of case studies for Application-based CPE; or • formative and summative assessments used to demonstrate that the participant achieved the stated objectives for Practice-based CPE. Meets ☐	Learner feedback is not consistent with the objectives or activity type. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

Section IV: EVALUATION

STANDARD 11: Evaluation of the CPE Activities

Providers must develop and conduct evaluations of CPE activities. The evaluations must allow pharmacists and technicians to provide feedback on elements relevant to the intended outcome.

Criterion and Evidence	Meets Criterion	Commendable	Needs Improvement
Activity Evaluation Process (Attach a description of the activity evaluation process.)	The provider has an evaluation process for its CPE activities which allows for feedback from learners. The provider periodically examines and revises its activity evaluation process for quality improvement. Meets ☐	Not Applicable	The provider does not have an evaluation process for its CPE activities. Needs Improvement ☐ or Additional Docs Required ☐
Activity Evaluation Elements (Attach CPE activity evaluations.)	Activity evaluations contain elements relevant to the intended outcome of the activity. Meets ☐	Not Applicable	Activity evaluations do not contain elements relevant to the intended outcome of the activity. Needs Improvement ☐ or Additional Docs Required ☐
Separate Evaluations for Pharmacists (Attach pharmacist activity evaluation summary data.)	Feedback from activities is summarized for pharmacists separately from non-pharmacists. Meets ☐ or N/A (CPE not offered for pharmacists) ☐	Not Applicable	When activities are offered to inter-professional audiences, the feedback from pharmacists is not summarized or evaluated separately from that received from non-pharmacists. Needs Improvement ☐ or Additional Docs Required ☐
Separate Evaluations for Technicians (Attach technician activity evaluation summary data.)	Feedback from activities is summarized for technicians separately from non-technicians. Meets ☐ or N/A (CPE not offered for technicians) ☐	Not Applicable	When activities are offered to inter-professional audiences, the feedback from pharmacy technicians is not summarized or evaluated separately from that received from non-technicians. Needs Improvement ☐ or Additional Docs Required ☐
Evaluation Feedback for Ongoing Improvement (Attach a description of how feedback from activity evaluations is used to improve the CPE program. Include any relevant evidence.)	Feedback is used systematically for ongoing improvement of the overall CPE program. Evaluation results are compiled, interpreted and returned to the faculty to assist in their effectiveness as educators. Meets ☐	The provider longitudinally assesses the effect of the educational activity on participants' practice. The provider's organization fosters a culture of research and evaluation to improve learning of activity participants, and also to add to the literature in adult and continuing education. Commend ☐	The provider does not collect data on the effectiveness of its educational activities, or use it in a systematic manner for the purpose of improving ongoing activities. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed):

STANDARD 12: Achievement and Impact of CPE Mission and Goals

Providers must establish and implement evaluation plans that assess achievement and impact of stated mission and goals (Standard 1). They must use this information for continuous development and improvement of the CPE program.

Criterion and Evidence	Meets Criterion	Needs Improvement
Assessment of achievement and impact	The provider assesses achievement and impact of stated mission and goals (Standard 1). Meets ☐	Providers have neither established nor implemented evaluation plans that assess achievement and impact of stated mission and goals. Needs Improvement ☐ or Additional Docs Required ☐
Documenting achievement (Attach the evaluation plan, data, and the analysis that documents the achievement of the mission and goals.)	The provider has an evaluation plan that includes collecting data and analyzing it to document achievement of the mission and goals. Meets ☐	The provider has no evaluation plan or it does not collect data or analyze it to document achievement of the mission and goals. Needs Improvement ☐ or Additional Docs Required ☐
Assessment for continuous development and improvement	The provider uses assessment information for continuous development and improvement of the CPE program. Meets ☐	The provider does not use assessment information for continuous development and improvement of the CPE program. Needs Improvement ☐ or Additional Docs Required ☐
Periodic Updates	The provider's mission and goals are periodically updated using the results of the evaluation plan. Meets ☐	The provider's mission and goals are not periodically updated using the results of the evaluation plan. Needs Improvement ☐ or Additional Docs Required ☐
Evaluation of Knowledge-based CPE (Attach a description and summary of data supporting the outcomes measurement.)	Knowledge-based CPE activities are evaluated using participation, satisfaction, and learning measures. Meets ☐ or N/A (Knowledge-based CPE is not offered) ☐	Knowledge-based CPE activities are not evaluated using participation, satisfaction, and learning measures. Needs Improvement ☐ or Additional Docs Required ☐
Evaluation of Application-based CPE (Attach a description and summary of data supporting the outcomes measurement.)	Application-based CPE activities are evaluated using participation, satisfaction, learning, and performance measures (e.g., through demonstration during the activity and intended application in practice). Meets ☐ or N/A (Application-based CPE not offered) ☐	Application-based CPE activities are not evaluated using participation, satisfaction, learning, and performance measures. Needs Improvement ☐ or Additional Docs Required ☐
Evaluation of Practice-based CPE (Attach a description and summary of data supporting the outcomes measurement.)	Practice-based CPE activities are evaluated using participation, satisfaction, learning, performance measures (e.g., through demonstration during the activity and application in practice post-activity), and, if applicable, data on changes to patient and/or population health. Meets ☐ or N/A (Practice-based CPE not offered) ☐	Practice-based CPE activities not are evaluated using participation, satisfaction, learning, performance measures, or, when applicable, data on changes to patient and/or population health. Needs Improvement ☐ or Additional Docs Required ☐

If the rating is Needs Improvement, briefly explain the rationale (use additional sheets if needed)