

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 enter into a joint providership with an ACPE-accredited provider to offer a CPE activity. The organization may review the list of ACPE-accredited providers on the [ACPE website](#). 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 joint providership. The organization does not need to complete the application following this document. Facts regarding joint providership can be found [here](#).

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. An ineligible company, i.e., whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients, is not eligible for provider 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:

- ◆ 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. 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.
- ◆ Eligibility Survey (located 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). The applicant 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 fee	July (invoice = ½ lowest annual fee)	February (invoice = lowest annual fee)
Participation in ACPE Administrator Workshop	During the initial term of accreditation; ideally before submission of the First Review Report	

CPE Provider Accreditation Term:

If accreditation status is awarded, the standard term of initial accreditation is two years. During the initial term, providers are expected to respond to requests for information, report activities via the Provider Web Tool, transmit credit via CPE Monitor®, 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 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 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 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 to be used when registering for a CPE activity from an ACPE-accredited provider. For a given activity, the provider will have multiple mechanisms available to transmit the required information. After CPE units are processed by ACPE and NABP, pharmacists and pharmacy technicians are able to login to a comprehensive electronic profile to access information about their completed CPE activities.

Technical specifications are available to assist providers in the transmission process of learner 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 Initial Application

Please submit the Initial Application electronically to ACPE as **one** 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 with supporting documentation and appendices included in the same file as the report.

Applications should be no more than 500 pages including appendices. Additionally, the applicant is encouraged to limit the file size to no more than 80MB. In order to minimize the length and size while providing the necessary documentation, applicants should place evidence in one section of the report (rather than multiple sections) and use summary and/or aggregate evidence rather than raw data where possible. Additionally, minimizing the amount of large graphic files (e.g., JPEG, PNG, GIF) can help contain the size of the report. If the applicant believes the report will exceed 500 pages, ACPE staff should be contacted for guidance.

The Application should be organized using the following methods:

1) Table of Contents

The Application should be paginated with the page numbers associated with each component listed in the Table of Contents. For example:

Table of Contents	
Components	Page(s)
Application Overview	1
New Provider Summary Sheet	2
Organization Summary Sheet	3-4
Eligibility Survey	5-8
Policies and Procedures Manual	9-30
Activity Announcement Checklist	31
Activity Announcements	32-35
Standard 1 – Achievement of Mission and Goals	
Rubric	36
Mission and Goals of CPE Program	37-38
Standard 2 – Gap Analysis	
Rubric	39
Narrative	40-41
.....	...
Appendix 1: Assessment Plan for Mission and Goals	75-77
Appendix 2: Data Analysis for Achievement of Mission/Goals	78-82
Appendix 3: Gap Analysis for Activity A	83-85

- 2) Clearly identify the components of the report using [PDF bookmarks](#) according to the Table of Contents. The use of hyperlinks is also encouraged to allow reviewers to quickly locate and link to information within the report.
- 3) Clearly label all supporting documentation, using materials from the CE activities self-selected by the organization.

ACPE GUIDELINES FOR CONTINUING EDUCATION PROVIDERS PREPARING ELECTRONIC DOCUMENTS

Preparing for evaluation for purposes of accreditation requires the submission of an in-depth and broadly-based self-assessment document. ACPE staff has drafted the following guidelines to assist in preparing and submitting an electronic report.

Provide start-up directions: Inform the reviewer of hardware and software needed to evaluate the report. 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 report must run on both Macintosh and PC computers.

Provide required applications: Provide installers for any applications needed for reviewing the report 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. Use simple navigation so that the viewer either scrolls through a document or pages through it. Avoid making the reviewer 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 be properly viewed on the reviewers' computer will not be considered in the report.

Limit web access or file downloads to optional materials: The applicant should submit all information and materials that are required for the Application. The 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.

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	

Secondary Contact (secondary point of contact for ACPE-related communications) - REQUIRED

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

Organizational Information - REQUIRED

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



APPLICATION: ORGANIZATION SUMMARY SHEET

Please complete and submit at the beginning your application.

- How long has your organization offered Continuing Education?
_____ (number of years)
- Do you conduct or plan to conduct CE activities for (select one):
 Pharmacists only
 Pharmacy technicians only
 Both pharmacists and pharmacy technicians
 Other _____
- After reviewing the definition of CPE activity types, what types of activities do you conduct or plan to conduct (select all that apply):
 Knowledge-based
 Application-based
 Certificate Programs

***For your Application submission**

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

- Knowledge-based (K)
- Application-based (A)
- Certificate Program (C)

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 applicant's CE 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, C)*



GENERAL STANDARDS FOR ACPE-ACCREDITED PROVIDERS OF CONTINUING PHARMACY EDUCATION (CPE)

INITIAL APPLICATION – EVALUATION FORM (RUBRIC) GUIDELINES

The following document is the evaluation form (rubric) for the CPE Policies and Procedures, four Sections and eleven Standards of the *ACPE Standards for Continuing Pharmacy Education*.

For each component of the report, you should assess your CPE 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 item ensuring that each criterion in the rubric evaluation grid is addressed. If you believe that an item does not apply to your organization, please explain.

For each criterion, the applicant is to indicate its self-assessment rating by marking the corresponding checkbox:

- **Meets Criterion:** The applicant has achieved all the elements required by the criterion.
 - **Needs Improvement:** The applicant 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 applicant meets the criterion. For example, the applicant'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/page number and/or use hyperlinks. Feel free to include documentation 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.

Eligibility Survey

Organizational Assessment to Determine Eligibility for Accreditation

ACPE Standards for Integrity and Independence do not allow an ineligible company, or any entity owned or controlled by an ineligible company to be an accredited provider. The definition allows an accredited provider to be owned by a firm that is not an ineligible company. It also allows a provider to have a 'sister company' that is an ineligible company, 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 an ineligible company to be accredited.

The survey consists of the following sections:

1. Provider
2. Sister Company – evaluation of business units that are 'parallel' to the provider (e.g., same level on the organizational chart)
3. Parent/Overall Company – evaluation of 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.

ACPE-accredited Provider

- 1. Ineligible companies are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.**

Organizations eligible to be accredited are those whose mission and function are: (1) providing clinical services directly to patients; or (2) the education of healthcare professionals; or (3) serving as fiduciary to patients, the public, or population health; and other organizations that are not otherwise ineligible.

Based on the definition above, is your organization (ACPE-accredited provider) considered to be an ineligible company?

- No** – Not an ineligible company
- Yes** – It is an ineligible company
- Uncertain

2. Please describe the rationale for your response above.

Sister Companies

3. Ineligible companies are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

Based on the definition above, are any of your sister companies considered to be an ineligible company?

- No** – Not an ineligible company
- Yes** – It is an ineligible company
- Uncertain
- Not applicable

4. Please describe the rationale for your response above.

Parent/Overall Organization

5. Ineligible companies are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

Based on the definition above, is your parent company or larger organization considered to be an ineligible company?

- No** – Not an ineligible company
- Yes** – It is an ineligible company
- 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 or ceinfo@acpe-accredit.org 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 applicant 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 unless Needs Improvement column is checked.	Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
2.0	CPE Activities 2a. Knowledge-based (K) 2b. Application-based (A) 2c. Certificate Program		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
3.0	Joint Providership		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
4.0	CPE Activity Announcement Literature** 4a. Activity 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. <input type="checkbox"/> Meets for All <input type="checkbox"/> or Meets for at Least One	Every selected activity announcement is missing at least one required element as measured by the activity announcement checklist. <input type="checkbox"/> Needs Improvement <input type="checkbox"/> or Additional Docs Required
5.0	Continuing Education Credit 5a. Live CPE activities 5b. Home study CPE activities 5c. Partial credit	Meets requirements unless Needs Improvement column is checked.	Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
6.0	Recordkeeping		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
7.0	Awarding CPE Credit 7a. Technical Specifications Guide 7b. Statements of Credit for Other Health Care Professionals 7c. Administrative Warning 7d. Awarding Late Credit		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>

Policies & Procedures – Section V		Meets Criterion	Needs Improvement
8.0	Financial Resources		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
9.0	Provider Web Tool 9a. Change in Administrator 9b. Accreditation Certificate 9c. Activity Description Forms (ADF) 9d. Universal Activity Numbers (UAN) 9e. Late Activity Description Form		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
10.0	Fees		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
11.0	Organization Name Change or Merger		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
12.0	Substantive Change Policy		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>

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

*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.

ACPE Standards for Integrity and Independence - Policies and Procedures

The applicant is asked to submit policies and procedures defining the organization's processes to implement the Standards for Integrity and Independence.

The following list identifies the policies and procedures that relate to the requirements for the Standards for Integrity and Independence (Standard 5).

Standards for Integrity and Independence		Meets Criterion	Needs Improvement
5.1	Ensure Content is Valid	Meets requirements unless Needs Improvement column is checked.	Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
5.2	Prevent Commercial Bias and Marketing in Accredited Continuing Education		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
5.3	Identify, Mitigate, and Disclose Relevant Financial Relationships 5.3 (1-3) – Identify Relevant Financial Relationships 5.3 (4) – Mitigate Relevant Financial Relationships 5.3 (5) – Disclose Relevant Financial Relationships to Learners		Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
5.4	Manage Commercial Support Appropriately 5.4 (1) - Decision-Making and Disbursement 5.4 (2) - Agreement 5.4 (3) - Accountability 5.4 (4) - Disclosure to Learners	Policies and procedures address all aspects of appropriate use of commercial support. Meets <input type="checkbox"/> We Do Not accept commercial support for any directly or jointly provided CPE activities <input type="checkbox"/>	Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
5.5	Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education	Meets requirements unless Needs Improvement column is checked.	Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>

**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.

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. (<u>Avoid</u> “understand,” “learn,” etc.) *			
B. Type of activity, i.e., knowledge, application, certificate program*			
C. Target audience(s) that may best benefit from participation in the activity			
D. Faculty member(s) name, degree, and title/position*			
E. Fees for the activity			
F. Schedule of the educational activities			
G. The amount of CPE credit, specified in contact hours or CEUs			
H. The official ACPE logo, used in conjunction with the statement identifying the accredited provider sponsoring the activity: “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 with the appropriate target audience designation (‘P’ and/or ‘T’) in the activity UAN			
J. A full description of all requirements established by the provider for successful completion of the CPE activity and subsequent awarding of credit (e.g., passing a post-test at a specified proficiency level, completing an activity evaluation form, participating in all sessions or certain combinations of sessions that have been designed as a track, NABP e-PID number, month/day of birth for submission to CPE Monitor®, etc.).			
K. Acknowledgment of any organization(s) providing financial support for any component of the educational activity of the CPE activity			
L. For home study activities: the initial release date and the expiration date.			
M. For Virtual events: Access to System requirements: The Internet browser(s) supported and minimum versions of each required by the learner to complete the online activity; The minimum memory, storage, processor, and internet speeds require by the learner to complete the online activity			

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

Section I: Content of Continuing Pharmacy Education Activities

STANDARD 1: Achievement of Mission and Goals of the CPE Program

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

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

Criterion and Evidence	Meets Criterion	Needs Improvement
Mission Statement (Attach CPE mission statement.)	The provider has a CPE mission statement that defines the basis and intended outcomes for its CPE program, including the intended audience and the scope of activities. Meets <input type="checkbox"/>	The provider does not have a CPE mission statement that defines the basis and intended outcomes for its CPE program and/or does not indicate the intended audience and the scope of activities. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Strategic Plan/Goals (Attach strategic plan/goal statements.)	The strategic plan/goals indicate how the mission will be achieved. CPE goals are concise and measurable statements. Meets <input type="checkbox"/>	The strategic plan/goals do not indicate how the mission will be achieved and/or are not concise and measurable statements. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Assessment plan (Attach assessment plan.)	The provider has an assessment plan to evaluate achievement of its mission and goals. Meets <input type="checkbox"/>	The provider does not have an assessment plan to evaluate achievement of its mission and goals. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Documenting achievement (Attach data that document achievement of the mission and/or goals.)	The provider includes data collection and analysis to document achievement of the mission and goals. Meets <input type="checkbox"/>	The provider does not include data collection or analysis to document achievement of the mission and goals. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Continuous development and improvement	The provider uses the results to demonstrate continuous development and improvement of the CPE program. Meets <input type="checkbox"/>	The provider does not use the results to demonstrate continuous development and improvement of the CPE program. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>

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

STANDARD 2: Gap Analysis

The provider must develop CPE activities based on a knowledge, skill, or practice gap. The provider should identify gaps between what pharmacists and pharmacy technicians currently know or do and what is needed and desired in practice.

Criterion and Evidence	Meets Criterion	Needs Improvement
Gap Identification Process (Attach description of how gaps are identified.)	The provider describes the process of how knowledge, skill, or practice gaps are identified. Meets <input type="checkbox"/>	The provider does not have a process of identifying knowledge, skill, or practice gaps. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Gap Analysis (Attach evidence of gaps identified.)	The provider identifies a gap between what pharmacists and/or pharmacy technicians currently do and what is needed and desired in practice. Meets <input type="checkbox"/>	The provider does not identify gaps between what pharmacists and/or pharmacy technicians do and what is needed or desired in practice. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Educational Need(s) for Pharmacists (Attach description of educational need(s) that cause the identified gap.)	The provider determines the cause(s) of the identified practice gap(s) for pharmacists, e.g., lack of knowledge, skill, attitude, and/or experience. Meets <input type="checkbox"/> or N/A (CPE not offered for pharmacists) <input type="checkbox"/>	The provider does not determine cause(s) of the identified practice gap(s) for pharmacists, e.g., lack of knowledge, skill, attitude, and/or experience. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Objectives Address Educational Need for Pharmacists (Attach evidence of how objectives are developed to address the identified educational need.)	The objectives are developed to specifically address the identified educational need and the activity type. Meets <input type="checkbox"/> or N/A (CPE not offered for pharmacists) <input type="checkbox"/>	The objectives do not address the identified educational need or the activity type. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Educational Need(s) for Pharmacy Technicians (Attach description of educational need(s) that cause the identified gap.)	The provider determines the cause(s) of the identified practice gap(s) for pharmacy technicians, e.g., lack of knowledge, skill, attitude, and/or experience. Meets <input type="checkbox"/> or N/A (CPE not offered for technicians) <input type="checkbox"/>	The provider does not determine cause(s) of the identified practice gap(s) for pharmacy technicians, e.g., lack of knowledge, skill, attitude, and/or experience. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Objectives Address Educational Need for Pharmacy Technicians (Attach evidence of how objectives are developed to address the identified educational need.)	The objectives are developed to specifically address the identified educational need and the activity type. Meets <input type="checkbox"/> or N/A (CPE not offered for technicians) <input type="checkbox"/>	The objectives do not address the identified educational need or the activity type. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>

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

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.

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
Activities Structured by Type for Pharmacists (Attach the policy and procedure or description of the process used to assign K, A, P activity type designators.)	The provider structures each CPE activity to meet the knowledge-, application- and/or certificate program-based educational needs of pharmacists. Meets <input type="checkbox"/> or N/A (CPE not offered for pharmacists) <input type="checkbox"/>	The provider does not have a structured process to assign each CPE activity to meet the knowledge-, application- and/or certificate program-based educational needs of pharmacists. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Content of Activity Appropriate for Pharmacists Note: Refer to the Definition of Pharmacy (Standard 1) and associated appendices for guidance on suitable content.	The objectives relate to content that is within the scope of practice for a pharmacist and are reflective for what a pharmacist will be able to do at the completion of the activity. Meets <input type="checkbox"/> or N/A (CPE not offered for pharmacists) <input type="checkbox"/>	The objectives relate to content that is not appropriate for a pharmacist. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Activities Structured by Type for Pharmacy Technicians (Attach the policy and procedure or description of the process used to assign K, A, P activity type designators.)	The provider structures each CPE activity to meet the knowledge-, application- and/or certificate program-based educational needs of pharmacy technicians. Meets <input type="checkbox"/> or N/A (CPE not offered for technicians) <input type="checkbox"/>	The provider does not have a structured process to assign each CPE activity to meet the knowledge-, application- and/or certificate program-based educational needs of pharmacy technicians. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Content of Activity Appropriate for Pharmacy Technicians Note: Refer to the Definition of Pharmacy (Standard 1) and associated appendices for guidance on suitable content.	The objectives relate to content that is within the scope of practice for a pharmacy technician and are reflective for what a pharmacy technician will be able to do at the completion of the activity. Meets <input type="checkbox"/> or N/A (CPE not offered for technicians) <input type="checkbox"/>	The objectives relate to content that is not appropriate for a pharmacy technician. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Knowledge-based Activities		
Knowledge-based CPE Purpose	Knowledge-based CPE activities are designed primarily for participants to acquire factual knowledge. Meets <input type="checkbox"/> or N/A (Knowledge-based CPE not offered) <input type="checkbox"/>	CPE activities that have been labeled as knowledge-based are not designed primarily for participants to acquire factual knowledge. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Knowledge-based CPE Credit (Reference activity announcements.)	The minimum credit for knowledge-based CPE is 15 minutes or 0.25 contact hour. Meets <input type="checkbox"/> or N/A (Knowledge-based CPE not offered) <input type="checkbox"/>	The provider incorrectly assigns credit to a knowledge-based CPE activity or misidentifies it as knowledge-based CPE when it is not. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Objectives for Knowledge-based CPE activities Note: Verbs for objectives must elicit	Objectives are measurable and specific for knowledge-based activities.	Objectives are consistently non-measurable and non-specific for knowledge-based activities.

or describe observable or measurable behaviors on the part of activity participants.	<p>Meets for All Activities <input type="checkbox"/></p> <p>or Meets for at Least One Activity <input type="checkbox"/></p> <p>or N/A (Knowledge-based CPE not offered) <input type="checkbox"/></p>	<p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>
Application-based Activities		
Application-based CPE Purpose (Attach syllabus or describe how Certificate Program activities are designed to meet the listed requirements.)	<p>Application-based CPE activities are designed primarily for participants to apply the information learned in the allotted timeframe.</p> <p>Meets <input type="checkbox"/></p> <p>or N/A (Application-based CPE not offered) <input type="checkbox"/></p>	<p>CPE activities that have been labeled as application-based are not designed primarily for participants to apply the information learned in the allotted timeframe.</p> <p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>
Application-based CPE Credit (Reference activity announcements.)	<p>The minimum credit for application-based CPE is 30 minutes or 0.5 contact hour.</p> <p>Meets <input type="checkbox"/></p> <p>or N/A (Application-based CPE not offered) <input type="checkbox"/></p>	<p>The provider incorrectly assigns credit to an application-based CPE activity or misidentifies it as application-based CPE when it is not.</p> <p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>
Objectives for Application-based CPE activities Note: Verbs for objectives must elicit or describe observable or measurable behaviors on the part of activity participants.	<p>Objectives are measurable and specific for application-based activities.</p> <p>Meets for All Activities <input type="checkbox"/></p> <p>or Meets for at Least One Activity <input type="checkbox"/></p> <p>or N/A (Application-based CPE not offered) <input type="checkbox"/></p>	<p>Objectives are consistently non-measurable and non-specific for application-based activities.</p> <p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>
Certificate Program (previously named Practice-based) Activities		
Certificate Program CPE Purpose (Attach syllabus or describe how Certificate Program activities are designed to meet the listed requirements.)	<p>Certificate program CPE activities are designed primarily for participants to systematically acquire specific knowledge, skills, attitudes, and performance behaviors that expand or enhance practice competencies.</p> <p>Meets <input type="checkbox"/></p> <p>or N/A (Certificate Program CPE not offered) <input type="checkbox"/></p>	<p>CPE activities that have been labeled as certificate programs are not designed primarily for participants to systematically acquire specific knowledge, skills, attitudes, and performance behaviors that expand or enhance practice competencies.</p> <p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>
Certificate Program CPE Components	<p>Certificate program CPE activities include a didactic component and a practice component.</p> <p>Meets <input type="checkbox"/></p> <p>or N/A (Certificate Program CPE not offered) <input type="checkbox"/></p>	<p>Certificate program CPE activities do not include both a didactic component and a practice component.</p> <p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>
Certificate Program CPE Minimum Credit (Reference activity announcements.)	<p>The minimum credit for certificate program CPE is 8 contact hours.</p> <p>Meets <input type="checkbox"/></p> <p>or N/A (Certificate Program CPE not offered) <input type="checkbox"/></p>	<p>The provider incorrectly assigns credit to a certificate program CPE activity or misidentifies it as certificate program CPE when it is not.</p> <p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>
Objectives for Certificate Program CPE activities Note: Verbs for objectives must elicit or describe observable or measurable behaviors on the part of activity participants.	<p>Objectives are measurable and specific for certificate program activities.</p> <p>Meets for All Activities <input type="checkbox"/></p> <p>or Meets for at Least One Activity <input type="checkbox"/></p> <p>or N/A (Certificate Program CPE not offered) <input type="checkbox"/></p>	<p>Objectives are consistently non-measurable and non-specific for certificate program activities.</p> <p>Needs Improvement <input type="checkbox"/></p> <p>or Additional Docs Required <input type="checkbox"/></p>

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

Identify, Mitigate, and Disclose Relevant Financial Relationships		
<p>Identify relevant financial relationships [5.3 (1-3)]</p> <p>(Attach evidence of identification of relevant financial relationships.)</p>	<p>The provider:</p> <ul style="list-style-type: none"> Collects information from all planners, faculty, and others in control of content about all financial relationships with ineligible companies within the prior 24 months, i.e. name of company and nature of relationship. Excludes owners or employees of ineligible companies. (Three exceptions to exclusion are outlined in the standard.) Identifies relevant financial relationships. <p>Meets <input type="checkbox"/></p>	<p>The provider does not collect information from all individuals in control of content about all financial relationships with ineligible companies within the prior 24 months or does not exclude owners/employees of ineligible companies or does not identify relevant financial relationships.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
<p>Mitigate relevant financial relationships [5.3 (4)]</p> <p>(Attach evidence of mitigation of relevant financial relationships.)</p>	<p>Prior to the individuals assuming their roles, the provider take steps to prevent all those with relevant financial relationships from inserting commercial bias into content. Steps taken are documented by the provider.</p> <p>Meets <input type="checkbox"/></p>	<p>The provider does not take steps to prevent all those with relevant financial relationships from inserting commercial bias into content. Or mitigation does not occur prior to individuals assuming their roles. Or the provider does not document the mitigation steps taken.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
<p>Disclose all relevant financial relationships to learners [5.3 (5)]</p> <p>(Attach evidence of disclosure to learners.)</p>	<p>The provider discloses the following to learners prior to engaging in the activity:</p> <ol style="list-style-type: none"> Names of the individuals with relevant financial relationships. Names of the ineligible companies with which they have relationships. Nature of the relationships. A statement that all relevant financial relationships have been mitigated. If applicable, a statement of disclosure of absence of relevant financial relationship(s) (either individually or as a group). <p>Ineligible companies' corporate or product logos, trade names, or product group messages are not included in disclosure to learners.</p> <p>Meets <input type="checkbox"/></p>	<p>The provider does not disclose relevant financial relationships on the part of all individuals in a position to control content. Or learners do not receive disclosure information before engaging with the activity. Or disclosure includes corporate or product logos, trade names, or product group messages of ineligible companies.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
Manage Commercial Support Appropriately		
<p><input type="checkbox"/> We Do Not accept commercial support for any directly or jointly provided CPE activities. (If checked, this section is not applicable.)</p>		
<p>Decision-making and disbursement [5.4 (1)]</p> <p>(Attach evidence of decision-making and disbursement, e.g. grant agreements, income/expense statements.)</p>	<p>The provider makes all decisions regarding receipt and disbursement of commercial support.</p> <ol style="list-style-type: none"> Ineligible companies do not pay directly for any of the expenses related to the education or the learners. If commercial support is used to fund honoraria or travel expenses, it is only for planners, faculty, or others in control of content for those roles. Commercial support is not used to pay for travel, lodging, honoraria, or personal expenses for individual learners or groups of learners. If commercial support is used to defray or eliminate the cost of the education, it is for all learners. 	<p>The provider allows ineligible companies to influence decisions regarding the disposition and disbursement of commercial support. Or direct payment is given by ineligible companies to learners or those involved in the activity (e.g., planners, teachers, authors).</p> <p>The provider pays honoraria or expenses to learners. Or the provider uses commercial support to defray or eliminate the cost of the education for individual learners or groups of learners.</p>

	Meets <input type="checkbox"/>	Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Agreements [5.4 (2)] (Attach grant agreements for requested commercially supported activities.)	The provider uses agreements executed by the ineligible company and provider prior to the activity that specify the terms, conditions, and purposes of the commercial support. Meets <input type="checkbox"/>	The provider does not use written agreements when commercial support is obtained or the agreements do not document that the provider retains responsibility. Or the agreements are missing, unexecuted or completed after the activity. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Accountability [5.4 (3)] (Attach evidence of receipt and expenditure of commercial support, e.g., income/expense statements.)	The provider keeps a record of the amount or kind of commercial support received and how it was used. Meets <input type="checkbox"/>	The provider does not keep a record of the amount or kind of commercial support or cannot produce accounting records. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Disclosure to learners [5.4 (4)] (Attach evidence of disclosure to learners.)	The provider discloses to the learners the name(s) of the ineligible company(ies) that gave the commercial support, or the nature of the support if it was in-kind, prior to the learners engaging in the activity. Disclosure does not include the ineligible companies' corporate or product logos, trade names, or product group messages. Meets <input type="checkbox"/>	The provider does not disclose to learners the name(s) of the ineligible company(ies) that gave the commercial support, or the nature of the support if it was in-kind. Or disclosure does not occur prior to learners engaging in the activity. Or disclosure includes corporate or product logos, trade names, or product group messages of ineligible companies. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Manage Ancillary Activities Offered in Conjunction with Accredited Continuing Education		
Arrangements [5.5 (1)] (Reference evidence of arrangements made to separate marketing from continuing education, e.g., agreements.)	The provider ensures arrangements to allow ineligible companies to market or exhibit in association with accredited education are not: <ul style="list-style-type: none"> a. Influencing any decisions related to the planning, delivery, and evaluation of the education. b. Interfering with the presentation of the education. c. A condition of the provision of financial or in-kind support from ineligible companies for the education. Meets <input type="checkbox"/> or N/A (Exhibits/Marketing not associated with CE) <input type="checkbox"/>	Arrangements for marketing or exhibits by ineligible companies influence decisions related to the planning, delivery, and evaluation of the accredited education, or interfere with the presentation of the education, or are a condition of the provision of financial or in-kind support from ineligible companies for the education. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Management [5.5 (2)] (Reference evidence of separation of marketing from continuing education, e.g., activity announcements, educational materials.)	The provider ensures that marketing by ineligible companies is kept separate from the educational activity. <ul style="list-style-type: none"> • Live: Marketing, exhibits, and non-accredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationships do not occur in the educational space within 30 minutes before or after an accredited activity. • Print, online, or digital: Learners are not presented with marketing while engaged in the activity or made to click through, watch, listen to, or be presented with 	The provider does not ensure that marketing by ineligible companies is kept separate from the educational activity. <ul style="list-style-type: none"> • Live: Marketing and non-accredited education occur in the educational space within 30 minutes before or after an accredited activity. • Print, online, or digital: Learners are presented with marketing while engaged in the activity. Or learners must click through, watch, listen to, or be presented with product promotion or product-specific advertisement in order to engage with educational content.

	<p>product promotion or product-specific advertisement in order to engage with CE content.</p> <p>Educational materials do not contain any marketing produced by or for an ineligible company, including corporate or product logos, trade names, or product group messages.</p> <p>Meets <input type="checkbox"/></p>	<p>Or educational materials contain marketing produced by or for an ineligible company, including corporate or product logos, trade names, or product group messages.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
Management [5.5 (3)]	<p>The provider does not allow ineligible companies to provide access to, or distribute, CE to learners.</p> <p>Meets <input type="checkbox"/></p>	<p>The provider allows ineligible companies to provide access to or distribute CE to learners.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>

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

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

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
<p>Active Participation in Live CPE</p> <p>(Attach a description of what is done to foster active participation of learners in live activities; include examples of actual learning materials.)</p>	<p>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.</p> <p>Meets <input type="checkbox"/> or N/A (live CPE not offered) <input type="checkbox"/></p>	<p><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.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
<p>Active Participation in Home Study CPE</p> <p>(Attach a description of what is done to foster active participation of learners in home study activities; include examples of actual learning materials.)</p>	<p>The provider designs and implements learning activities to foster active participation as a component of <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.</p> <p>Meets <input type="checkbox"/> or N/A (home study CPE not offered) <input type="checkbox"/></p>	<p><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.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
<p>Objectives Matched to Active-Learning Activity</p> <p>(Attach evidence of how objectives are addressed by active learning.)</p>	<p>In general, the objectives are addressed by an active learning activity.</p> <p>Meets <input type="checkbox"/></p>	<p>The objectives are not addressed by an active learning activity.</p> <p>Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>

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
<p>Educational Materials for Each CPE Activity</p> <p>(Attach educational materials from the activities.)</p>	<p>The provider offers educational materials (e.g., handouts, outlines, background material, selected bibliographies, audiovisual aids, etc.) for each CPE activity.</p> <p style="text-align: right;">Meets <input type="checkbox"/></p>	<p>Educational materials are not offered for each CPE activity.</p> <p style="text-align: right;">Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
<p>Educational Materials for Achieving Objectives</p>	<p>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.</p> <p style="text-align: right;">Meets <input type="checkbox"/></p>	<p>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.</p> <p style="text-align: right;">Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>

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 <input type="checkbox"/>	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 <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
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 <input type="checkbox"/>	The provider does not use a learning assessment as the basis for awarding CPE credit. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Learning Assessment for Knowledge-based CPE	Knowledge-based CPE activities include assessment questions to determine recall of facts. Meets <input type="checkbox"/> or N/A (Knowledge-based CPE not offered) <input type="checkbox"/>	Knowledge-based CPE activities do not include assessment questions to determine recall of facts. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Learning Assessment for Application-based CPE	Application-based CPE activities include case studies structured to address application of the principles learned. Meets <input type="checkbox"/> or N/A (Application-based CPE not offered) <input type="checkbox"/>	Application-based CPE activities lack case studies structured to address application of the principles learned. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Learning Assessment for Certificate Program CPE	Certificate Program CPE activities include formative and summative assessments that demonstrate that the participants achieved the stated objectives. Meets <input type="checkbox"/> or N/A (Certificate Program CPE not offered) <input type="checkbox"/>	Certificate Program CPE activities lack formative and summative assessments that demonstrate that the participants achieved the stated objectives. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Objectives Are Assessed (Attach evidence of how objectives are covered by a learning assessment.)	In general, the objectives are covered by a learning assessment. Meets <input type="checkbox"/>	The objectives are not covered by a learning assessment. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>

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
<p>Appropriate, Constructive Feedback to Learners</p> <p>(Attach a description with examples of how feedback is provided to participants.)</p>	<p>Learner assessment feedback is provided to participants in an appropriate and constructive manner.</p> <p style="text-align: right;">Meets <input type="checkbox"/></p>	<p>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.")</p> <p>Opportunities to cheat are present. (e.g., giving answers to questions before post tests are collected.)</p> <p style="text-align: right;">Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
<p>Timely Feedback to Learners</p>	<p>Learner assessment feedback is provided to participants in a timely manner.</p> <p style="text-align: right;">Meets <input type="checkbox"/></p>	<p>Learner assessment feedback is not provided to participants in a timely manner.</p> <p style="text-align: right;">Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>
<p>Feedback to Learners Consistent with objectives and CPE Type</p>	<p>Learner feedback is consistent with the objectives and activity type. For example, feedback may include</p> <ul style="list-style-type: none"> • 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 Certificate Program CPE. <p style="text-align: right;">Meets <input type="checkbox"/></p>	<p>Learner feedback is not consistent with the objectives or activity type.</p> <p style="text-align: right;">Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/></p>

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	Needs Improvement
Activity Evaluation Process (Attach a description of the activity evaluation process.)	The provider has an evaluation process for its CPE activities that allows for feedback from learners. The provider periodically examines and revises its activity evaluation process for quality improvement. Meets <input type="checkbox"/>	The provider does not have an evaluation process for its CPE activities. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Activity Evaluation Elements (Attach CPE activity evaluations.)	Activity evaluations contain elements relevant to the intended outcome of the activity. Meets <input type="checkbox"/>	Activity evaluations do not contain elements relevant to the intended outcome of the activity. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Separate Evaluations for Pharmacists (Attach pharmacist activity evaluation summary data.)	Feedback from activities is summarized for pharmacists separately from non-pharmacists. Meets <input type="checkbox"/> or N/A (CPE not offered for pharmacists) <input type="checkbox"/>	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 <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Separate Evaluations for Technicians (Attach technician activity evaluation summary data.)	Feedback from activities is summarized for technicians separately from non-technicians. Meets <input type="checkbox"/> or N/A (CPE not offered for technicians) <input type="checkbox"/>	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 <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
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 <input type="checkbox"/>	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 <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>
Monitoring for Promotion, Marketing, and Commercial Bias (Standard 5) (Attach evidence of monitoring process, e.g., activity evaluation forms, surveys, focus groups.)	The provider uses methods to allow learners to give feedback on sources of promotion, marketing, and commercial bias and addresses identified promotion/marketing/bias. Meets <input type="checkbox"/>	The provider does not monitor for the presence of promotion, marketing, and commercial bias in activities or does not address identified promotion/marketing/bias. Needs Improvement <input type="checkbox"/> or Additional Docs Required <input type="checkbox"/>

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