CPE Activity Audit Checklist

CDR CPEU Prior Approval Program

CPE Providers will be asked to provide the information in this checklist on activity audit.

Click here to access the CDR CPEU Prior Approval Program Provider Policy Manual

Audit Component (Application Field Type)	Note	Done
Accountable Contact (Drop-Down List)	The Accountable Contact (AC) completing the audit will select their name. Preferably, this is the AC who submitted the activity application but could be any approved AC within the CPE Provider Account.	
Access to CPE Activity (Upload)	The AC will upload the CPE activity or otherwise provide access to the CPE activity. At a minimum, this should include • slide decks, reading-based materials, or other medium for sharing content • video or audio recordings • disclosures to learners	
Other CPE Activity Materials (Upload)	The AC will upload CPE materials not otherwise indicated, as applicable. These might include • abstracts • presenter biographies • handouts • other	
Learner Assessment (Upload)	**For Live (Activity Type 172), Enduring (Activity Type 741), and Mixed activities only,** the AC will upload the Learner Assessment. If the Learner Assessment was a Q/A session, the AC will upload a description of the session. **For Certificate Programs (Activity Type 120) only**, the AC will upload both the Formative and Summative Learner Assessments.	
Standards for Passing Summative Assessment (Upload)	**For Certificate Programs (Activity Type 120) only,** the AC will upload the standards for passing the Summative Assessment, as communicated to practitioners before engaging in CPE content.	
Completed Summative Assessments (Upload)	**For Certificate Programs (Activity Type 120) only,** the AC will upload at least two completed Summative Assessments.	
Results of Summative Assessment (Free Text)	**For Certificate Programs (Activity Type 120)** the AC will describe how the results of the Learner Assessments have been or will be used to improve the quality of the CPE activity.	
CPEU Calculations (Free Text)	**For Non-Enduring (Activity Types 161, 172, 181, and 231), Enduring (Activity Type 741), and Mixed Activities only,** the AC will describe how CPEUs were calculated for the **activity**. Additionally, **for Live (Activity Type 172), Enduring (Activity Type 741), and Mixed Activities only,** the AC will describe how the amount of time was determined for the **Learner Assessment**. **For Certificate Programs (Activity Type 120),** the AC will write N/A.	
Final Reference List / Bibliography (Upload)	The AC will upload the final reference list / bibliography *only* if it is different from the reference list / bibliography submitted on activity application.	
Certificate of Completion (Upload)	The AC will upload the certificate of completion as distributed to learners.	
Activity Evaluation (Upload)	The AC will upload activity evaluation(s). At a minimum, the AC will upload the blank evaluation that was provided to learners.	

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Print, Email, and Other Communications (Upload)	The AC will upload print, email, or other communications related to the CPE activity.	
Information About the CPE That Does Not Contain Educational Content (Upload)	The AC will upload information about the CPE activity that does not contain educational content (e.g., agendas) in the format that was shared with learners.	
Confidentiality and Use of Learner Names and Contact Information (Free Text)	The AC will describe how the CPE Provider ensures that learner names and contact information are not shared without the learners' explicit consent, including to non-CPE divisions of the Provider's company, parent company, or affiliate companies.	
Disclosure Forms or Documentation of Disclosure Information (Upload)	The AC will upload the disclosure forms or documentation of disclosure information for all individuals who influenced, controlled, contributed to, or presented CPE content. Refer to Policy 8.1: Collection of Disclosure Information.	
CPE Activity Developer(s) (Free Text)	The AC will list the names of the CPE activity developer(s).	
Documentation of Commercial Support (Upload)	The AC will upload commercial support agreements and / or documentation of commercial support *only* if commercial support was used for the CPE activity. Refer to Policy 9.4: Documentation of Commercial Support.	
Documentation of Funding (Upload)	The AC will upload documentation of funding *only* if funding was used for the CPE activity. Refer to Policy 10.1: Documentation of Funding.	
Other Information (Free Text)	AC will have the option of adding additional information for CDR.	

In addition to the above audit application components, activity-related materials provided by the complainant (*if applicable*) will be evaluated during the audit process.