



eMedEd



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Continuing Medical Education Activity Planning Checklist

This checklist is designed to guide CME/CE providers through the planning, execution, and evaluation of accredited educational activities. It ensures compliance with ACCME, ANCC, and ACPE standards and helps maintain audit readiness.

1

Pre-Planning

- ☐ Identify practice gaps and educational needs
- ☐ Conduct a needs assessment (literature review, surveys, guidelines)
- ☐ Define target audience and learner profile
- ☐ Determine activity type (Live, Enduring Material, Webinar, etc.)
- ☐ Confirm accreditation type and credit hours
- ☐ Draft initial budget and resource allocation

2

Content Development

- ☐ Recruit and confirm faculty or speakers
- ☐ Collect faculty disclosures of financial relationships
- ☐ Identify and resolve conflicts of interest
- ☐ Develop learning objectives and outcomes framework
- ☐ Ensure content is evidence-based and free from commercial bias
- ☐ Prepare presentation slides, enduring materials, and handouts

3

Accreditation & Compliance

- ☐ Submit activity for accreditation review if required
- ☐ Include proper accreditation and credit designation statements
- ☐ Ensure commercial support agreements (if applicable) are in place
- ☐ Apply policies for the separation of promotion from education
- ☐ Maintain documentation for audit readiness

4

Implementation

- ☐ Open registration and confirm audience communication
- ☐ Ensure faculty and moderator briefings are completed
- ☐ Set up activity evaluation and post-test
- ☐ Provide disclosures to learners prior to the activity
- ☐ Record attendance and participation

5

Post-Activity & Evaluation

- ☐ Collect and analyze participant evaluations and post-test results
- ☐ Measure outcomes against learning objectives and expected performance change
- ☐ Submit credit reporting to boards (if applicable)
- ☐ Provide certificates of completion to participants
- ☐ Archive activity documentation for the required retention period
- ☐ Conduct internal debrief for continuous improvement

Prepared By: _____

Date: _____

