

# Continuing Education Activity Checklist



The checklist below serves as a guide for planners to ensure all required documentation is submitted to VCU Health Continuing Education. Please contact your VCU Health Continuing Education representative if you have any questions.

## REQUIRED BEFORE ANY PROMOTION OF ACTIVITY

### Completed CE Activity Application

Accessed in the CloudCE portal at <https://vcu.cloud-cme.com/Application.aspx>.

User must sign in to create an application. You may need to create an account.

Download: [Online Application Instructions](#)

Download: [Planning Guide](#)

**Submit at least 60 business days before event date to avoid rush review fee**

### Program Agenda with schedule, including times/breaks/lunch, etc. uploaded with application.

A draft agenda is acceptable. Be sure the agenda includes start/end times for presentations, breaks, and meals.

### Planning Committee Conflict of Interest Forms

Completed in the CloudCME portal.

Enter all planning committee member names and email addresses in the “Planners and Faculty” section of the application form. The CloudCME portal will automatically send an email with instructions to complete the COI form to each planner.

### Resolution of Conflict(s) of Interest Form (if applicable)

*To be completed by the Activity Director (or designee) for those planning committee members who indicated a relevant conflict of interest on the COI form.*

This form is being transitioned into the CloudCE portal, in the interim please e-mail completed form to your CE representative.

Download: [COI Resolution Form](#)

### Marketing Materials for review and approval (if applicable)

Submit any save the date announcements, flyers, brochures, websites for review to ensure proper accreditation statements are listed.

Please note: The CE Activity Application, all Planner Conflict of Interest forms, and any relevant Resolution of COI forms must be reviewed and approved before any promotional materials are produced and distributed.

Download: [Accreditation and Credit Designation Statement for VCU/VCU Health Partners](#)

Download: [Accreditation and Credit Designation Statement for McGuire VAMC & Other External Partners](#)

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## DUE THREE WEEKS IN ADVANCE OF ACTIVITY

- \_\_\_\_\_ **Letter of Understanding (LoU)** between VCU Health CE and Department/Organization  
Sent via DocuSign to the activity coordinator upon CE Application approval. Once executed, CE staff will return a fully executed copy with an invoice for administrative fees.
  
- \_\_\_\_\_ **Completed Speaker/Faculty Conflict of Interest Disclosure Forms**  
Enter all confirmed speaker/faculty names and email addresses in the “Planners and Faculty” section of the application form. The CloudCE portal will automatically send an email with instructions to complete the COI form to each speaker.  
*Speaker COI forms are not required to be complete for CE Application approval but must be submitted in advance of activity date.*
  
- \_\_\_\_\_ **CV and Bio-sketch for all Faculty/Speakers**  
You may upload these for your faculty/speakers through Faculty Management or assign them the task to complete through the faculty portal. See [help page](#) for information on adding forms to faculty.
  
- \_\_\_\_\_ **Resolution of Conflict(s) of Interest form for Presenters**  
*This is not applicable for speakers who do not list a relevant conflict*  
Resolution forms are completed by the Activity Director (or designee) for presenter(s) with relevant conflict(s) of interest. If this review cannot be completed before the activity, the presentations cannot be designated for CE credit, and the total credits for the program will be reduced.  
Please e-mail completed forms to your CE representative.  
Download: [COI Resolution Form](#)
  
- \_\_\_\_\_ Draft of **Evaluation Form** for Review and Approval  
*Only applicable for those programs not using CloudCME online evaluation and certificate download.*  
Download: [Evaluation Sample](#)
  
- \_\_\_\_\_ Draft of **Verification of Participation (VOP)** for Review and Approval  
*Only applicable for those programs not using CloudCE online evaluation and certificate download.*  
Download: [Verification of Participation Template](#)
  
- \_\_\_\_\_ **Conflict of Interest Disclosure (COI) and Commercial/In-Kind Support Announcement –**  
\*MUST be presented to all attendees either by printed handout or powerpoint slide. This information must be shared with your attendees, even if no COI is declared and/or no commercial/in-kind support has been provided.  
Download: [Acknowledgement of COI & Commercial Support Handout Template](#)  
Download: [Acknowledgement of COI & Commercial Support PowerPoint Template](#)

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## DUE WITHIN 15 DAYS OF ACTIVITY END DATE

\_\_\_\_\_ **Copy of final program syllabus and all instructional materials distributed**

Submit to your CE representative by e-mail.

\_\_\_\_\_ **Completed Verification of Participation (VOP) Forms**

Submit to your CE representative by e-mail.

*Only applicable for those programs not using CloudCE online evaluation and certificate download.*

\_\_\_\_\_ **Custom Data Import Excel Spreadsheet** with required participant data

Submit to your CE representative by e-mail.

*Only applicable for those programs not using CloudCE online evaluation and certificate download.*

Download: [Custom Data Import Spreadsheet](#)

\_\_\_\_\_ **Tabulated Evaluation Results Data**

*Only applicable for those programs not using CloudCE online evaluation and certificate download.*