



Planner Checklist

As Soon As Possible

Task	Instructions	
Worksheet Part I Accreditation Criteria	Gap Analysis	<input type="checkbox"/>
Worksheet Part II Activity Set-Up Form and Application & Standards for Integrity and Independence	Activity Information and Acknowledgement	<input type="checkbox"/>
Faculty list template	Provide a list of planners & speakers using a template we will provide	<input type="checkbox"/>
Speaker headshots and bios and planner bios	Provide information about your speakers(s)	<input type="checkbox"/>

Before Publication of Activity

Task	Instructions	
Activity or conference agenda	For live activities only	<input type="checkbox"/>
Logos	Upload logos or images to be used in your activity	<input type="checkbox"/>
Email communication templates to participants	Our system sends automatic activity reminders on whatever frequency is preferred	<input type="checkbox"/>

30 Days Before Activity

Task	Instructions	
Evaluation template	All activities are evaluated for learning outcomes. We provide templated information and you can include additional questions.	<input type="checkbox"/>

30 Days After Activity

Task	Instructions	
Monetary Tracking Sheet	It is a requirement that accredited activities report funding and revenue information to us. We provide a template that you submit at the conclusion of an activity.	<input type="checkbox"/>