

## CPD ACCREDITATION/CERTIFICATION STEP-BY-STEP GUIDE

### CPD ACCREDITATION/CERTIFICATION APPLICATION FORMS:

1. In order to facilitate the accreditation process, ensure you are completing the most current CPD accreditation/certification application forms. Consult with our web site at: [CPD Accreditation/Certification Application Form](#)
2. Ensure to complete the General Accreditation Application Form and the application form of the credit category/categories you are requesting (links are found on page 18 of the general application form). Answer all the questions.
3. The completed application forms, including all supporting documentations, must be submitted 8 weeks prior to the start date of the activity. Late fees will apply if the Accreditation/Certification Application Form and/or supporting documentations are received less than 8 weeks prior to the start date of the activity.

### SUBMIT ALL SUPPORTING DOCUMENTS:

- **Signed and completed** general accreditation application form (SPC Chair signature, pg. 13)
- **Signed and completed** application form(s) of credits being requested (Pg. 18)
- Invitations / promotional materials disseminated to participants: hardcopy, website, blogs, etc...
- Speaker invitation template and communication stating CPD standards
- Signed letter/agreement (by both parties) outlining the terms, conditions, and purposes by which sponsorship is provided and that funds were received in the form of an educational grant
- If funding received via Pharma, provide the organization branding: logos, colors, symbols, etc...
- If the SPC/PO chooses to delegate to a third party payment of expenses, provide the signed agreement detailing the roles and responsibilities
- Copy of the schedule (preliminary if not finalized)
- Signed copy of the Financial Support / Content Development Disclosure Form (Scientific Planning Committee Chair, pg.14)
- Signed copy of the Financial Competing Interests Form (Scientific Planning Committee Chair, pg.15)
- Signed copies of the Declaration of Potential Conflict of Interest Form (Scientific Planning Committee Chair and Organizing Committee, pg.16)
- Declaration of Potential Conflict of Interest (COI) - Resource Person Listing (pg.17) – Mandatory to complete
- Scientific Planning Committee (SPC) meeting minutes, e-mail correspondence, etc... including discussion of key elements
- Needs Assessment: Summary
- Evaluation form - template
- PowerPoint Slide Set - Content (PDF of slides not acceptable) – mandatory, in particular if the activity is funded by one for-profit or not-for-profit organization - not required for live single delivery large conferences featuring many speakers. However, the reviewer may request the PPT(s) for review. If the activity is presented in English and French, submit PPT(s) in both languages
- Slides that will be presented to participants with SPC conflict of interest disclosure statements
- Slides that will be presented to participants with speaker conflicts of interest disclosure statements
- Signed Ethical review form and promotional materials for (Scientific Planning Committee Chair, pg. 19)

If requesting Section 3 credits, ensure to include the following supporting documents

- Copy of Budget
- Learning objectives and scoring sheet
- Participant's reflection tools
- Participant's feedback strategies
- Sample participant's correct and incorrect answers report
- Instructors evaluation tool, ex.: videotaped assessment

**PLEASE READ:** The content and all required supporting documents (final versions) are to be submitted at the same time as all application forms. Should the CPD office receive supporting documents less than 8 weeks prior to the start date of the activity, late fees will apply.

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### ACCREDITATION/CERTIFICATION APPROVAL:

Once the activity has been approved, CPD will forward you:

- A letter of the accreditation approval, including the type of credits and total number of credits granted, the Associate Dean's comments and the deadline for submitting your final report;
- Certificate request form; [Certificate Request Form](#)
- Official wording that must appear verbatim on the final printed material;
- Sample of "Sign-in-Sheet": to be signed by delegates and original returned to CPD with final report; [TEMPLATE - Sign-in Sheet](#)
- Sample(s) of Excel spreadsheet "All Participants List": to be completed and returned to CPD with final report; [TEMPLATE - Excel Spreadsheet – All Participants List](#)  
[TEMPLATE - Excel Spreadsheet – All Participants List - Per Date](#)

### ACCREDITATION/CERTIFICATION REVIEW FEES

Once the review has been completed, an invoice indicating all fees (+ applicable taxes) linked to your activity will be submitted to you. Please see the classifications listed below to identify which system applies to you.

**1. External to McGill:**

McGill's Accounts Receivable Office will be sending you a detailed invoice with all applicable fees.

**2. Hospital Departments:** This is a hospital policy.

We require a Purchase Order number (PO) document from your Purchasing Department. **Request to be made once you receive a quote from our Office at the end of the review process.** Please issue the PO number under the Vendor/Supplier indicated below:

McGill University  
Accounts Receivable  
3465 Durocher St., Suite #323  
Montreal, QC H2X 0A8

Contact: Maria Anania – [maria.anania@mcgill.ca](mailto:maria.anania@mcgill.ca)  
Telephone: 514-398-2311 | Fax: 514-398-1327

**3. McGill University Units - paying via FOAPAL:**

The CPD Office will be sending you a detailed invoice with all applicable fees.

**CERTIFICATES:****Option 1: Order certificates from the CPD Office (note: certificates are not personalized)**

1. **Complete this “Certificate Request Form”** - Answer all the questions  
**Submit** at least 2 weeks prior to the start date of the activity
2. Once CPD receives your request, a draft of the certificate will be forwarded to you for approval
3. Sign the draft certificate to confirm printing approval or return with modifications
4. Certificate fees vary from \$ 2.75 to \$ 4.50/each + shipping and handling + taxes
5. Certificates will be shipped via courier to the person requesting the certificates

**Option 2: Create your own certificate template – Approval required prior to distributing to participants**

1. Submit a copy of the certificate template to the CPD Office  
**Submit** at the same time as the accreditation/certification application form
2. The template will undergo a review to ensure CPD compliance
3. Once approved you will be notified via the accreditation approval letter
4. Review fee + taxes will apply

Accreditation may be revoked should you distribute certificates that have not been approved or drafted by the CPD office.

\* Express fee is applicable if certificate request form is submitted less than 2 weeks prior to the event start date.

**FINAL REPORT: Final Report - Submit 8 weeks after the end of the accreditation period****1. Complete the “Final Report Form” and submit to CPD Office via email**

- Answer all the questions

**2. Submit all required documentation:**

- Promotional brochure(s)
- Copy of the syllabus
- Promotional information or handouts distributed
- **All Participants List:** including participant’s first name, family name, license number, province, accreditation date, credit type, name of event, email and **credit quantity earned for each individual** - Electronic and hardcopy copies
- **Sign-in-Sheet**, original: including participants first name, family name, license number and original signatures
- The compiled results from participants’ completed evaluation forms

Submit your accreditation/certification application form and supporting materials via email: [cpd.med@mcgill.ca](mailto:cpd.med@mcgill.ca)

Should you be submitting your accreditation application form, supporting material or other documentation to McGill CPD via Drop Box or another file hosting service, please ensure to provide access for at least a 6 week duration and admission to multiple users.