



Audit Documentation Checklist

The following information must be provided within 30 days of the audit notification date. The information should be submitted via the online audit form.

AAFP CRITERIA:

- ❑ Copies of all CME activity marketing materials such as an agenda, brochure, syllabus, and/or handouts.
- ❑ Performance Improvement or Point of Care activities must include documentation of how learners engaged in each of the required steps.
- ❑ Complete the [educational plan template](#) outlining the activity's/session's audience, professional practice gaps, needs assessment, core competencies, learning objectives, format(s), learner engagement, and outcome method(s) including providing evidence of the needs assessment(s) conducted.
- ❑ [Credit calculation](#) for determining the credit requested.
- ❑ Evidence of learner outcome (e.g., blank copy of the test/assessment and a summary of the data.).
- ❑ AAFP member information and description of involvement (if applicable).
- ❑ Documentation of [AAFP credit statement](#) and [AAFP CME seal](#) (if used).
- ❑ Collaboration information, including letter of agreement (LOA) (if activity was created in collaboration with another organization).
- ❑ Educational materials such as presentations, slide decks, articles, and/or journals used during the activity including access to enduring or online content (if applicable).

ACCME STANDARDS:

- ❑ Describe how your organization complied with Standard [2.1](#), [2.2](#), and [2.3](#).
- ❑ Complete the [content controller spreadsheet](#). ([Standard 3](#))
- ❑ Provide a copy of your organization's Relevant Financial Relationship CME Policy and a blank CME disclosure form ([example](#)). ([Standard 3](#))
- ❑ Evidence of steps taken to mitigate any relevant financial relationships (if applicable). ([Standard 3.4](#))
- ❑ Evidence of disclosure of all relevant financial relationships (or lack thereof) to learners prior to the start of the education. ([Standard 3.5](#))
- ❑ Letters of agreement (LOA), disclosure of commercial support, and expenditure of support (if the activity received commercial support). ([Standard 4](#))
- ❑ Description on how your organization complied with [Standard 5](#).