

CE/CME Activity Review Report

Tier 2: Compliance + Content Review

ACTIVITY TITLE

Communicating Across the Care Team: Leadership Skills for Clinical Professionals

Submitting Organization	Meridian Regional Health System (Fictional Sample)
Activity Type	Live Educational Activity / CME
Accrediting Body	ACCME (Accreditation Council for CME)
Credit Designation	2.0 AMA PRA Category 1 Credits™
Activity Date	April 15, 2026
Review Tier	Tier 2: Compliance and Full Content Review
Review Completed	April 28, 2026
Reviewer	Dr. Amber Martinez Llanes, EdD, MBA, PMP, SHRM-CP, Prosci

IMPORTANT: This is a sample document created for portfolio purposes. All organization names, activity titles, and participant information are fictional.

Executive Summary

COMPLIANCE Met with Minor Revisions	CONTENT QUALITY 8.3 / 10	ITEMS TO ADDRESS 3 Recommendations	CREDIT ELIGIBLE Yes, pending revisions
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Overall Finding

The activity demonstrates strong educational design and meaningful clinical relevance. The identified need is well-documented, content is evidence-based, and the instructional format appropriately matches the learning objectives. Three items require attention prior to final approval: one learning objective needs behavioral refinement, disclosure documentation formatting is incomplete per current ACCME guidelines, and a post-activity evaluation mechanism has not been identified.

Summary of Findings

Strengths • Educational need clearly identified with supporting gap data • Content is current, accurate, and free from commercial bias • Learning objectives are specific and professionally relevant • Case-based format appropriately supports skill application • Faculty credentials well-matched to content area	Areas for Revision • Objective 3 requires a measurable behavioral outcome statement • Disclosure forms missing relationship duration for 2 of 4 faculty • No post-activity evaluation tool identified or attached
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Section 1: ACCME Compliance Review

Each criterion is evaluated against current ACCME Standards for Integrity and Independence in Accredited Continuing Education (2023 revision).

Criterion	Status	Reviewer Notes
Identified Need Gap/need documented with supporting evidence	Met	Practice gap clearly stated with reference to AHRQ data on communication failures in clinical teams. Supporting citations provided.
Educational Objectives Objectives specific, measurable, and learner-centered	Needs Attention	Objectives 1, 2, and 4 are measurable and well-written. Objective 3 ("Understand the impact of communication styles") lacks a behavioral verb. Revise to reflect observable action.
Content Validity Content accurate, current, and evidence-based	Met	All clinical content references peer-reviewed sources published within 5 years. No factual inaccuracies identified during review.
Independence Free from commercial bias and influence	Met	No commercial support was received for this activity. Content shows no evidence of promotional messaging or product favoritism.
Disclosure Faculty relationships disclosed per ACCME standards	Needs Attention	Disclosures present for all 4 faculty. However, 2 disclosures are missing the required relationship duration field. Must be completed before submission.
Credit Designation Credit hours appropriate for activity length and content	Met	2.0 AMA PRA Category 1 Credits™ appropriate for a 2-hour activity with verified educational content.
Evaluation Plan Mechanism to assess learning outcomes identified	Needs Attention	No post-activity evaluation tool has been submitted. Recommend adding a brief knowledge check or participant reflection instrument.
Learner Engagement Format supports active learning and application	Met	Four case-based scenarios with facilitated debrief provide appropriate opportunity for skill application and reflection.

Section 2: Content Quality Assessment

Assessment Area	Score	Reviewer Notes
Content Accuracy & Currency	9/10	All content reflects current evidence-based practice. References are within the 5-year window with appropriate primary sources.
Alignment to Identified Need	9/10	Strong alignment between documented gap, objectives, and content delivery. The content directly addresses communication failures in clinical handoff scenarios.
Clarity & Readability	8/10	Content is well-organized and professionally presented. Module 3 introduction could be more clearly connected to the preceding case scenario.
Instructional Design	8/10	Effective use of adult learning principles. Case-based format supports application. Consider adding a brief individual reflection before group debrief.
Learner Engagement	8/10	Four clinical scenarios are realistic and appropriately complex. Suggest adding one debrief prompt per scenario to guide discussion structure.
Bias & Balance	9/10	Content presents multiple clinical perspectives without promotional language. No identifiable commercial, cultural, or gender bias detected.
OVERALL CONTENT SCORE	8.5	Strong overall quality. Meets standards for accredited CE delivery pending the three identified revisions.

Section 3: Recommendations & Required Actions

The following recommendations are listed in priority order. Items marked High must be resolved prior to submission. Items marked Medium should be addressed before activity delivery. Items marked Low are suggested improvements for future iterations.

#	Priority	Recommendation	Required Action
1	High	Revise Learning Objective 3 to include a measurable behavioral outcome	Replace 'Understand the impact of...' with an action verb (e.g., Demonstrate, Apply, Distinguish). Resubmit revised objectives for confirmation.
2	High	Complete disclosure documentation for all faculty	Faculty members 2 and 3 must add relationship duration to their disclosure forms. All four disclosures must be complete before submission to accrediting body.
3	Medium	Add post-activity evaluation tool	Design and attach a brief 5-10 item knowledge check or structured reflection instrument. Recommend using a validated tool aligned to your accrediting body's requirements.
4	Low	Add a brief individual reflection prompt before group debrief in each module	Include a 2-minute written reflection prompt (e.g., "What would you do differently in this scenario?") before facilitating group discussion to deepen processing.

Reviewer Attestation

This review was conducted independently and objectively. The reviewer has no financial or personal relationship with the submitting organization that would constitute a conflict of interest. All findings and recommendations reflect professional judgment based on current accreditation standards.

Reviewer Dr. Amber Martinez Llanes EdD (Curriculum & Instruction) MBA PMP SHRM-CP Prosci Certified Certified Executive & Organizational Development Coach	Contact Talent Refinement, LLC info@talentrefinement.com www.talentrefinement.com Review Date: April 28, 2026
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