ADA CERP Application Self-Study Outline 2026

For reference by CE providers submitting applications due in January 2027

This document includes the questions that organizations will be asked to respond to in completing the ADA CERP application. It is provided for informational purposes only. ADA CERP reserves the right to modify questions for clarity and completeness at any time.

Beginning in June 2026, providers submitting ADA CERP applications will do so through an online portal. This outline is provided as a reference and planning tool for providers preparing to submit an application. This outline is subject to further changes and edits as our online portal undergoes testing. **This document is for educational purposes only; the application form is subject to further changes before it goes live in the online portal in September 2026.**

The application includes self-study questions where you are asked to **describe** how your organization meets the ADA CERP Standards and Policies. The ADA CERP criteria are provided in blue boxes for reference. After each criterion, you will be asked to provide a concise narrative and/or upload documentation demonstrating how your CE program meets the stated requirement. We encourage you to be succinct, answer the questions directly, and avoid extraneous information. Please keep all narrative responses under 500 words.

For some criteria you will be asked to **upload** documents (maximum size of 10MB per document; document types accepted are Word, Excel, and PDF) to demonstrate that your program meets ADA CERP requirements. In order to verify your performance in practice, some questions will ask for documentation from two specific CE activities you offered. You will identify those two courses on the List of CE Activities (Course A and Course B), and then provide documents from those same two courses when requested. Further information about selecting these courses is provided in the "General Information" section of this self-study.

Upload documents only where requested; do not upload miscellaneous documents.

GENERAL INFORMATION

ADA CERP Recognition Status

Is your organization currently ADA CERP recognized?

- Yes; my organization is currently recognized and seeking continuation of our ADA CERP recognition.
- No; my organization is seeking an initial term of ADA CERP recognition.

History and Overview of CE Program

Provide a brief description (500 words or fewer) of your continuing education program including:

- an overview of the organization and key personnel
- the types of CE activities offered (for instance: live lecture, self-study, hands-on, etc.)
- the audience served by the CE program
- the general content area(s) the CE program addresses

Organizational Chart

Upload an organizational chart that shows the leadership and structure of your CE program.

Upload a new document or select from existing documents

Organizational Change

Have there been any changes to ownership of your CE program, or other organizational changes, during your current ADA CERP recognition term? (For new providers: have there been any changes to the ownership of your CE program, or other organizational changes, since submitting your pre-application?)

- Yes
- No

If yes, explain the changes (CCEPR staff may contact you for more information): _____

Decision Report

Please attach your organization's most recent Decision Report

Upload a new document or select from existing documentsN/A – This is a new application, so our organization has not yet received a Decision Report.

List of CE Activities

Using the table below, list all CE activities your organization offered in the prior calendar year.

(Alternatively, **upload** a list of all CE activities offered in the prior calendar year containing all information requested in the table below using the List of Education Activities template available on the Resources for CE Providers page.)
In the first two rows (Course A and Course B) list the activities for which you will be providing information and documents in this self-study. You must use the same activities you list here throughout this self-study.

Requirements for Course A and B selection:

- If you accept commercial support for CE activities, you must list a commercially supported activity in Row A or B and provide documentation from this activity when requested.
- If you offer courses with clinical content and courses that are non-clinical, at least one course in Row A or B must be a course with clinical content.
- Providers that offer a variety of CE formats should select two different types of activities to document (for instance: one live lecture and one self-instructional activity, or one jointly provided activity and one course where live patients are treated, etc.).
- Providers that only offer one annual conference or meeting with multiple sessions should select two separate activities/sessions held during the conference as documentation of the two activities. Special reporting requirements are identified in the activity files (e.g. submission of one publicity form via the conference brochure, etc.)

When providing course materials for Course A and Course B:

- If a live or blended learning activity, include presentation slides, course outline, handouts, or final program book.
- If a self-study activity, provide screenshots of the activity, a URL, and credentials for reviewers to login (using generic username and not requiring the use of a personal password).
- Upload the required activity materials based on the type of activity.

Course	Activity Title	Activity Format	Activity Dates	Intended Audience	# dentist participants	# non-dentist participants	Joint providers	Commercial Support	No. CE credits
A								Y/N	
B								Y/N	

Educational Activities Spreadsheet

Upload a spreadsheet that includes all of the required information for the List of Education Activities template.

Upload a new document or select from existing documents

- Not applicable – all courses offered by the provider in the prior calendar year are captured in the "List of CE Activities" table above.

STANDARD 1. PURPOSE AND MISSION

1.1. Provider's CE mission
The provider has a mission statement for its CE program which identifies the intent and expected results of its CE programming in terms of changes in professional skills or performance, or patient outcomes.

Upload your organization's CE mission statement with the expected results of your CE program highlighted. Expected results must be articulated in terms of professional skills or performance, or patient outcomes.

1.2. Overall program analysis
The provider collects data and information on its CE program and analyzes the degree to which its CE mission is being met.

Describe:

1. The data and information you use to analyze whether your CE program is meeting its mission with respect to changes in professionals' skills or performance, or patient outcomes.
2. Your conclusions after conducting your most recent program analysis.

1.3. Overall program improvements
The provider identifies, plans and implements needed changes in the overall program in order to meet its CE mission.

Describe:

1. Any changes that you identified that may help you meet your mission.
2. Any changes that you have implemented or are in the process of implementing. For example, changes in planners, planning processes, instructors, educational methods, educational resources, facilities, organizational support or structure, etc.

1.4. Program administration
The provider has an identifiable, continuous administrative authority or individual with responsibility for administration of the provider's CE program. The administrator is responsible for ensuring that the CE program meets the ADA CERP Recognition Standards and Policies through an established planning, implementation, evaluation and record-keeping process.

Describe how you ensure that your CE programming meets ADA CERP requirements for planning, implementing and evaluating CE and record-keeping. Describe who is responsible for ensuring this.

Upload: Organizational chart of CE unit (or select from existing documents if already uploaded under General Information).

Upload: CE policy and procedure manual and/or CE personnel job descriptions detailing roles and responsibilities for CE program.

1.5. Advisory input in CE planning
The provider obtains input into the planning of its CE activities from health care professionals who are reflective of the target audience for which the provider's CE activities are designed.

Describe the ways in which you obtain input into the planning of CE activities from health care professionals who are reflective of the target audience for your CE activities. (For example, involving representatives of the target audience to participate in a planning group or committee, or serving as reviewers of planned course content, or drawing from the literature specific to the professionals for which the activities are designed.)

Describe how you obtained input from health professionals reflective of the target audience for these specific activities:

Course A
Course B

STANDARD 2. CE PLANNING

2.1. Educational needs
The provider identifies the educational needs and/or the professional practice gaps (gaps in knowledge, skills, performance) of their learners and incorporates these into their CE activities.

Describe the methods you use to identify professional practice gaps or the underlying educational needs of your learners.

Course A Course B

Describe how you incorporate this information into your course planning.

Course A Course B

Describe the professional practice gap(s) of your learners which you identified, and the underlying educational need(s) that you determined to be the cause of the professional practice gap(s), and on which these specific courses were based.

Course A
Course B

2.2. Designed to change
The provider develops CE activities that are designed to change professional competence or performance, or patient outcomes.

Describe what professional knowledge, skill or performance, or patient outcome, these specific activities were designed to change (i.e., what were the expected outcomes). patient outcomes.

Course A
Course B

Describe how you design activities to change your learner's professional competence or performance, or, if applicable, patient outcomes.

Course A
Course B

2.3. Educational formats
The provider chooses educational formats for each CE activity that are appropriate for the setting, objectives, and desired results of the activity, and which promote active learning.

Please provide the information as requested in the table below for each of these specific activities. Explain how the educational format(s) chosen for this course help achieve the objectives and desired results of this activity.

	Course A	Course B
Describe how you select the appropriate format for each CE activity, and how activities are designed to promote active learning to help achieve the expected results.		
Explain how the educational format(s) chosen for this course help achieve the objectives and desired results of this activity.		

2.4. Instructor qualifications
The provider chooses instructors who are qualified by education and experience to provide instruction the relevant subject matter.

Describe who at your organization is responsible for selecting qualified instructors and your organization's process for making these selections.

2.5. Instructor collaboration and communications
The provider communicates and collaborates with the instructor regarding the educational needs, objectives, active learning formats, and assessments for the activity.

Describe how you communicate with instructors regarding the educationalneeds, objectives, learning formats and assessment for each activity.

Upload communications with instructor(s)—for example, course planning forms, instructions/guidelines, correspondence, letters of agreement, etc..

Course A
Course B

2.6. Publicity

Publicity for the provider's CE activities is informative and not misleading, and includes:

a. Name of the provider and any joint providers
b. Contact information for the CE provider
c. Description of course content
d. Description of educational objectives
e. Description of educational methods used
f. Instructors' names and qualifications
g. Costs and refund policies
h. Location, date and times (live activities)
i. Release date and expiration date (self-study activities)
j. Number of CE credits to be awarded
k. Information on any pre-requisites
l. ADA CERP recognition statement and joint providership statement, when applicable.

Upload examples of course publicity for Course A and Course B demonstrating that complete and accurate information was published Please mark each item from the criteria with a-l.. Be sure to provide the entire document (brochure pages, screenshots of a webpage, etc.) so that the reviewers can see the required information in context. It is not necessary to provide examples of short, save-the-date type announcements.

Course A
Course B

STANDARD 3. INTEGRITY AND INDEPENDENCE

3.1. Ensure Content is Valid

Providers are responsible for ensuring that their education is fair and balanced and that any clinical content presented supports safe, effective patient care.

1. All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options.
2. All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.
3. Although accredited continuing education is an appropriate place to discuss, debate, and explore new and evolving topics, these areas need to be clearly identified as such within the program and individual presentations. It is the responsibility of accredited providers to facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning.
4. Organizations cannot be accredited if they advocate for unscientific approaches to diagnosis or therapy, or if their education promotes recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.

Describe what you do to ensure that the content of your CE activities meet all four elements of the criteria:

1. Clinical recommendations are based on current science and are fair and balanced.
2. References in support of clinical care recommendations conform to accepted scientific standards.

3. New and evolving topics that are not yet supported by science are clearly identified, and CE activities do not promote practices not yet adequately supported by science, evidence, or clinical reasoning.
4. CE activities do not promote unscientific approaches to diagnosis or therapy, and do not promote recommendations or treatments determined to have risks that outweigh the benefits, or that are ineffective.

Upload course materials for each activity (slide decks, presentations, handouts, etc.) and **attest** in the space provided that each activity meets these requirements.

When providing course materials for Course A and Course B:

- If a live or blended learning activity, include presentation slides, course outline, handouts, or final program book.
- If a self-study activity, provide screenshots of the activity, a URL, and credentials for reviewers to login (using generic username and not requiring the use of a personal password).
- Upload the required activity materials based on the type of activity

Course A
Course B

3.2. Prevent commercial bias and marketing in CE
Continuing education must protect learners from commercial bias and marketing.

1. The provider must ensure that all decisions related to the planning, faculty selection, delivery, and evaluation of accredited education are made without any influence or involvement from the owners and employees of an ineligible company (commercial interest).
2. CE must be free of marketing or sales of products or services. Faculty must not actively promote or sell products or services that serve their professional or financial interests during accredited education.
3. The provider must not share the names or contact information of learners with any ineligible company (commercial interest) or its agents without the explicit consent of the individual learner.

Describe what you do to meet the requirements of this Standard. How does your organization:

1. Ensure that all decisions related to the planning, faculty selection and delivery of CE are made without any influence or involvement from owners and employees of commercial interests.

   If you enter into joint providership with other organizations that are not ADA CERP recognized to jointly plan or administer CE activities, describe what you do to ensure that your organization does NOT engage in joint providerships with commercial interests.
2. Ensure that no marketing or sales of products or services occur within CE activities.
3. Ensure that names or contact information of learners are not shared with any commercial interest or its agents without the explicit consent of learners.

Upload course materials for each activity (if not previously uploaded under Standard 3.1) and **attest** in the space provided that each activity meets these requirements.

Course A
Course B

3.3. Identify, mitigate and disclose relevant financial relationships
Providers must take the following steps when developing CE. Exceptions are listed at the end of Standard 3.

1. **Collect information:** Collect information from all planners, faculty, and others in control of educational content about all their financial relationships with ineligible companies within the prior 24 months. There is no minimum financial threshold; individuals must disclose all financial relationships, regardless of the amount, with ineligible companies. Individuals must disclose regardless of their view of the relevance of the relationship to the education. Disclosure information must include:
    a. The name of the ineligible company with which the person has a financial relationship.
    b. The nature of the financial relationship.
        Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds

2. **Exclude owners or employees of ineligible companies:** Review the information about financial relationships to identify individuals who are owners or employees of ineligible companies. These individuals must be excluded from controlling content or participating as planners or faculty in CE. There are three exceptions to this exclusion—employees of commercial interests can participate as planners or faculty in these specific situations:
    a. When the content of the activity is not related to the business lines or products of their employer/company.
    b. When the content of the CE activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations.
    c. When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used.

3. **Identify relevant financial relationships:** Review the information about financial relationships to determine which relationships are relevant. Financial relationships are relevant if the educational content an individual can control is related to the business lines or products of the ineligible company.

4. **Mitigate relevant financial relationships**: Take steps to prevent all those with relevant financial relationships from inserting commercial bias into content.
    a. Mitigate relationships prior to the individuals assuming their roles. Take steps appropriate to the role of the individual. For example, steps for planners will likely be different than for faculty and would occur before planning begins.
    b. Document the steps taken to mitigate relevant financial relationships.

5. **Disclose all relevant financial relationships to learners:** Disclosure to learners must include each of the following:
    a. The names of the individuals with relevant financial relationships.
    b. The names of the ineligible companies with which they have relationships.
    c. The nature of the relationships.
    d. A statement that all relevant financial relationships have been mitigated.

Identify commercial interests by their name only. Disclosure to learners must not include ineligible companies' corporate or product logos, trade names, or product group messages.

Disclose absence of relevant financial relationships. Inform learners about planners, faculty, and others in control of content (either individually or as a group) with no relevant financial relationships with ineligible companies.

Learners must receive disclosure information, in a format that can be verified by ADA CERP, before engaging with the continuing education.

Exception: Providers do not need to identify, mitigate, or disclose relevant financial relationships for any CE that is non-clinical, such as leadership or communication skills training.

It is expected that all providers have processes in place to identify, mitigate and disclose all relevant financial relationships of all individuals in control of content, even if some or all of the provider's activities are non-clinical.

Describe:

1. How you collect information from all planners, instructors and others in control of educational content about all their financial relationships with commercial interests.
2. How you meet expectations regarding excluding owners or employees of commercial interests from participating as planners or faculty in CE activities or having control over CE content.
3. The process(es) you use to determine whether financial relationships disclosed are relevant to the educational content.
4. The steps you use to mitigate all relevant financial relationships for individuals involved in the planning of CE activities, such as planners, editors, and reviewers, and describe the steps you use to mitigate all relevant financial relationships for individuals with roles as speakers, authors, moderators and facilitators.
5. The ways in which you inform learners of the presence or absence of relevant financial relationships of all individuals in control of content, and that all relevant relationships have been mitigated.

Upload the following for Course A and Course B (if either course was non-clinical, select N/A below; there is no need to upload documents for non-clinical courses):

- Example of disclosure form used for the activity, including instructions and definitions provided to instructors;
- Compiled list of disclosures from all planners and instructors in this course, including the steps taken to mitigate any relevant financial relationships (use table provided);
- Disclosures and mitigation statement as published to learners.

Course A
Course B

Activity documentation is not required for any course that was non-clinical.

3.4. Manage commercial support appropriately
Standard 3.4 applies only to CE activities that receive financial or in-kind support from commercial interests.

Providers that choose to accept **commercial support** (defined as financial or in-kind support from ineligible companies (commercial interests) are responsible for ensuring that the education remains independent of the Ineligible company (commercial interest) and that the support

does not result in commercial bias or commercial influence in the education. The support does not establish a financial relationship between the ineligible company (commercial interest) and planners, faculty, and others in control of content of the education.

1. Decision-making and disbursement: The provider must make all decisions regarding the receipt and disbursement of the commercial support.
    a. Ineligible companies (commercial interests) must not pay directly for any of the expenses related to the education or the learners.
    b. The provider may use commercial support to fund honoraria or travel expenses of planners, faculty, and others in control of content for those roles only.
    c. The provider must not use commercial support to pay for travel, lodging, honoraria, or personal expenses for individual learners or groups of learners in CE.
    d. The provider may use commercial support to defray or eliminate the cost of the education for all learners.
2. Agreement**:** The terms, conditions, and purposes of the commercial support must be documented in an agreement between the ineligible company (commercial interest) and the provider. The agreement must be executed prior to the start of the CE. A provider can sign onto an existing agreement between an accredited provider and an ineligible company (commercial supporter) by indicating its acceptance of the terms, conditions, and amount of commercial support it will receive.
3. Accountability**:** The CERP recognized provider must keep a record of the amount or kind of commercial support received and how it was used, and must produce that accounting, upon request, by the accrediting body or by the company that provided the commercial support.
4. Disclosure to learners: The provider must disclose to the learners the name(s) of the company(ies) that gave the commercial support, and the nature of the support if it was in-kind,

If your organization accepts commercial support,

Describe what you do to ensure your organization meets the expectations of all four elements of Standard 3.4

Upload the following for Course A and Course B:

- Signed letters of agreement with all commercial supporters of these activities.
- Published disclosure of support to learners for these activities (indicate if this information was uploaded in another document)

Course A
Course B

Not required if no commercial support is accepted.

3.5. Manage Ancillary Activities in Conjunction with Accredited CE

Standard 3.5 applies only when there is marketing by commercial interests or nonaccredited education associated with the CE.

Providers are responsible for ensuring that education is separate from marketing by commercial interests—including advertising, sales, exhibits, and promotion—and from nonaccredited education offered in conjunction with CE.

1. Arrangements to allow commercial interests to market or exhibit in association with accredited education must not:
    a. Influence any decisions related to the planning, delivery, and evaluation of the education.
    b. Interfere with the presentation of the education.
    c. Be a condition of the provision of financial or in-kind support from commercial interests

for the education.

2. The provider must ensure that learners can easily distinguish between CE and other activities.
    a. Live continuing education activities: Marketing, exhibits, and nonaccredited education developed by or with influence from a commercial interest/ineligible company or with planners or faculty with unmitigated financial relationships must not occur in the educational space within 30 minutes before or after an accredited education activity. Activities that are part of the event but are not accredited for continuing education must be clearly labeled and communicated as such.
    b. Print, online, or digital continuing education activities: Learners must not be presented with marketing while engaged in the CE activity. Learners must be able to engage with the accredited education without having to click through, watch, listen to, or be presented with product promotion or product-specific advertisement.
    c. Educational materials that are part of CE (such as slides, abstracts, handouts, evaluation mechanisms, or disclosure information) must not contain any marketing produced by or for a commercial interest/ineligible company, including corporate or product logos, trade names, or product group messages.
    d. Information distributed about CE that does not include educational content, such as schedules and logistical information, may include marketing by or for an ineligible company.
3. Commercial interests may not provide access to, or distribute, CE to learners.

If your organization offers ancillary activities in conjunction with CE activities, such as advertising, sales, exhibits or promotion for commercial interests, or non-CE activities for commercial interests,

Describe how your organization meets the three items listed in the criterion above:

1. Arrangements for marketing or exhibit activities do not: (a) influence decisions related to the planning and delivery of the CE, (b) interfere with the presentation of the education, and (c) are not a condition for receiving commercial support (that is, any marketing or sales activities are managed separately from the commercial support).
2. Learners can easily distinguish between CE and other activities through physical separation and clear labeling and communications.
3. Commercial interests are not permitted to distribute or host your CE activities.

Upload publicity materials including a program schedule for ancillary marketing activities..

Course A
Course B

Upload documentation of physical separation of CE activities from ancillary marketing activities (can include clear labeling and communications).

Course A
Course B

STANDARD 4. EVALUATION

4.0. Analyze effectiveness of CE activities
The provider analyzes changes in learners' knowledge, performance or practice, and/or patient outcomes achieved as a result of the provider's CE programs.

Describe:

1. The strategies you use to obtain data on changes in learners' knowledge, performance or practice, or if applicable, patient outcomes, as a result of participating in your CE

activities.
2. What conclusions you reached as to whether or not you were able to change learner knowledge, performance or practice, or, if applicable, patient outcomes.

Upload the following information for Course A and Course B:

- A copy of the evaluation instrument(s) you used to assess changes in learners' knowledge, performance, or practice, or patient outcomes, as a result of participation in this activity.
- Summative data or information gathered from this activity regarding changes achieved in learners' knowledge, performance or practice, or patient outcomes.

Course A
Course B

STANDARD 5. PATIENT PROTECTION

5.0. Patient protection
Standard 5. Applies only to those providers that offer continuing education courses in which patients are treated. This includes courses in which the instructor or the learners perform procedures on patients.

A provider that offers CE courses in which patients are treated has protocols and procedures in place to ensure patient safety and privacy, including the following:

a. Ensuring that participants and instructors treating patients are in compliance with any applicable dental licensure laws in the jurisdiction where the course is being held;
b. Ensuring that providers, instructors and participants have liability protection where required;
c. Obtaining informed consent from patients;
d. Informing patients in plain language of
    i. The training situation
    ii. The nature and extent of the treatment to be rendered
    iii. Any benefits or potential harm that may result from the procedure
    iv. Available alternative procedures
    v. Their right to discontinue treatment
    vi. The name and contact information for the clinician responsible for answering questions, addressing concerns, and providing any necessary completion of treatment and post-treatment care, including emergency treatment.
e. Ensuring standard infection prevention and infection control protocols, sterile equipment and instruments in good working order, and access to emergency care.
f. Ensuring instructors/participants are up to date on patient safety protocols and emergency response procedures.

Assuming responsibility for competent completion of treatment, any necessary post-course treatment, and management of complications by a qualified clinician.

If your organization offers courses in which patients are treated by the instructor or the learners,

Describe how you ensure that each of the following requirements are met, and who is responsible for each:

a. Course participants and instructors are in compliance with applicable dental licensure laws;
b. Provider, instructors and participants have liability protection where required;
c. Obtaining informed consent from patients;
d. Informing patients in plain language regarding the training situation, the procedure, who to contact with questions or for follow-up care (as required by Standard 5.d.i-vi)
e. Ensuring infection prevention and control, appropriate instrumentation, etc.

f. Ensuring instructors and participants are up to date on patient safety protocols and emergency procedures'
g. Ensuring competent completion of treatment, post-course treatment and management of complications.

Upload:

- Example of registration form and/or correspondence with instructors and registrants requesting information on their dental license, OSHA and BLS certifications, and insurance coverage.
- Example of patient consent form used for treatments performed in CE course including required elements as noted in Standard 5.0.d.i.-vi..
- Example of instructions to patients treated in CE course regarding follow-up care, who to contact with questions, and in case of emergencies.