



Quality Assurance Checklist

A UKHCCEC staff member, activity director, moderator or other qualified designee should complete this form.

Activity Title Optimal

Activity Date November 7, 2025

CE Representative (name of individual completing this form) Amy Koestner

Number of speakers to review: 3

Presenter disclosed relevant financial interest via handout Yes

Speaker Judy Mikhail

Presenter disclosed relevant financial interest via handout Yes

Speaker checklist

Presentation was objective and fairly balanced

Slides and written materials do not contain any trade names or logos

Additional Comments:
Judy had no disclosers - this is really an NA

Speaker Dan Margulies

Presenter disclosed relevant financial interest via handout Yes

Speaker checklist

If used a trade name, compared and contrasted several products

Presentation was objective and fairly balanced

Participants were actively involved in the learning process through group discussion, Q and A, posttest, case study, simulation and/or problem-solving exercises

Additional Comments:

Dan had no disclosers

Speaker

Amy Koestner

Presenter disclosed relevant financial interest via handout

Yes

Speaker checklist

If used a trade name, compared and contrasted several products

Presentation was objective and fairly balanced

Participants were actively involved in the learning process through group discussion, Q and A, posttest, case study, simulation and/or problem-solving exercises

Additional Comments:

I had no disclosers

Assess Commercial Support

Representative on site:

No

Supporter involvement

No

Assess Ancillary Activities (Exhibits, Advertising, Promotion, Non-Accredited Activities, Social Events)

Accreditation standards require ancillary activities to be held outside the education space, or if held in the same educational space, to be separated by a 30 minute interval between the accredited activity and the ancillary activity.

Did the program include an ancillary activity?

No

Additional Comments:

We had no commercial support for the course

Ticket ID

37485

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