

CMA Guidelines Comparison

Continuing medical education/ Continuing professional development (CME/CPD)

2001 Guidelines	2007 Guidelines	R.C. Interpretations and Recommendations
<p>17. The primary purpose of CME/CPD activities is to address the educational needs of physicians and other health care providers in order to improve the health care of patients. Activities that are primarily promotional in nature should be identified as such to faculty and attendees and should not be considered as CME/CPD.</p>	<p>21. This section of the Guidelines is understood to address primarily medical education initiatives designed for practicing physicians. However, the same principles will also apply for educational events (such as noon-hour rounds and journal clubs) which are held as part of medical or residency training.</p>	<p>The extension of the CMA guidelines to include rounds, journal clubs and small group learning events supports the promotion of a uniform standard for all accredited group activities within Section 1.</p>
	<p>22. The primary purpose of CME/CPD activities is to address the educational needs of physicians and other health care providers in order to improve the health care of patients. Activities that are primarily promotional in nature, such as satellite symposia, should be identified as such to faculty and attendees and should not be considered as CME/CPD.</p>	<p>The educational needs of physicians are determined through a formal needs assessment process to include, where appropriate, perceived and unperceived needs. The identification of needs must describe gaps in knowledge, skills, performance, clinical care or health outcomes. Needs assessment must be translated into learning objectives, influence the selection of learning formats and be included within the evaluation strategies for an event.</p> <p>The term satellite symposium should only refer to unaccredited group learning activities. Satellite symposia must occur at times and locations separate from accredited group events. Participants attending Satellite symposia must be informed that the event can only be claimed under Section 2 or serve as the stimulus for a personal learning project.</p>
<p>18. The ultimate decision on the organization, content and choice of CME/CPD activities for physicians shall be made by the physician-organizers.</p>	<p>23. The ultimate decision on the organization, content and choice of CME/CPD activities for physicians shall be made by the physician-organizers.</p>	<p>CME conferences and courses are valued resources used by physicians to plan and implement practice specific CPD strategies. Accredited group CME therefore must be developed or co-developed by a physician organization who assumes responsibility for ensuring the educational and ethical standards for individual programs have been met.</p>

<p>19. CME/CPD organizers are responsible for ensuring the scientific validity, objectivity and completeness of CME/CPD activities. Organizers must disclose to the participants at their CME/CPD events any financial affiliations with manufacturers of products mentioned at the event or with manufacturers of competing products.</p>	<p>24. CME/CPD organizers and individual physician presenters are responsible for ensuring the scientific validity, objectivity and completeness of CME/CPD activities. Organizers and individual presenters must disclose to the participants at their CME/CPD events any financial affiliations with manufacturers of products mentioned at the event or with manufacturers of competing products. There should be a procedure available to manage conflicts once they are disclosed.</p>	<p>The scientific validity, objectivity and completeness of the content presented at an accredited group event are shared responsibilities between physician organizations and faculty. Physician organizations are responsible to select faculty, ensure each session has appropriate learning objectives and inform faculty of their obligations to develop presentations that are balanced and evidence informed. The Royal College disclosure policies require all faculty and planning committee members to disclose all financial relationships (not just those relevant to the subject being discussed) over the previous 2 years. Physician organizations are responsible to ensure there is a process to manage all identified conflicts of interests for both faculty and planning committee members.</p>
<p>20. The ultimate decision on funding arrangements for CME/CPD activities is the responsibility of the physician-organizers. Although the CME/CPD publicity and written materials should acknowledge the financial or other aid received, they must not identify the products of the company (ies) that fund the activities.</p>	<p>25. The ultimate decision on funding arrangements for CME/CPD activities is the responsibility of the physician-organizers. Although the CME/CPD publicity and written materials may acknowledge the financial or other aid received, they must not identify the products of the company (ies) that fund the activities.</p>	<p>Funding provided by commercial interests or organizations in support of accredited group learning events must be provided directly to the physician organization. Physician organizations are responsible to develop a budget, pay all conference expenses including the travel, accommodation, and honoraria (where applicable) for faculty presenters. The financial support provided by companies can be acknowledged within the conference materials. The inclusion of product specific materials on preliminary or final conference brochures or materials or any other material distributed to participants is strictly prohibited.</p>
<p>21. All funds from a commercial source should be in the form of an unrestricted educational grant payable to the institution or organization sponsoring the CME/CPD activity. Upon conclusion of the activity, the physician-organizers should be prepared to present a statement of account for the activity to the funding organizations and other relevant parties.</p>	<p>26. All funds from a commercial source should be in the form of an unrestricted educational grant payable to the institution or organization sponsoring the CME/CPD activity.</p>	<p>The term “unrestricted” educational grant is problematic for commercial sponsors that are under legal obligations to ensure any financial support provided is directed to a specific event or activity. Therefore the Royal College is recommending the use of the term “educational grant” to refer to financial support provided a specific event. Organizations providing financial support to accredited CPD events cannot have any role or influence over any aspect of the CPD planning process. Physician organizations that receive “education grants” should provide a statement of account to each sponsoring organization for how funding was allocated or spent.</p>

<p>No equivalent</p>	<p>27. Industry representatives should not be members of CME content planning committees. They may be involved in providing logistical support.</p>	<p>Membership of a scientific (content) planning committee for an accredited CPD activity must reflect the intended target audience. The integrity of the educational planning process therefore would prohibit the inclusion of industry representatives as members of scientific planning committees. Industry representatives could assist or contribute to logistical planning of accredited group events.</p>
<p>22. Whenever possible, generic names should be used rather than trade names in the course of CME/CPD activities. In particular, physicians should not engage in peer selling.* If specific products or services are mentioned, there should be a balanced presentation of the prevailing body of scientific information on the product or service and of reasonable, alternative treatment options. If unapproved uses of a product or service are discussed, presenters must inform the audience of this fact. Faculty must disclose to the participants at CME/CPD events any financial affiliations with manufacturers of products or service providers mentioned at the event or with manufacturers of competing products or providers of competing services.</p>	<p>28. Generic names should be used in addition to trade names in the course of CME/CPD activities.</p>	<p>Faculty who present at accredited group events must develop presentations and recommendations that are balanced and objective. The Royal College requires faculty presentations to be consistent in their use of either generic names, trade names or both generic and trade names during their presentation. The monitoring of faculty compliance to the consistent use of drug names should be monitored by the physician organization responsible for the CME/CPD event</p>
	<p>29. Physicians should not engage in peer selling. Peer selling occurs when a pharmaceutical or medical device manufacturer or service provider engages a physician to conduct a seminar or similar event that focuses on its own products and is designed to enhance the sale of those products. This also applies to third party contracting on behalf of industry. This form of participation would reasonably be seen as being in contravention of the CMA's Code of Ethics, which prohibits endorsement of a specific product.</p>	<p>Peer selling is primarily judged on the basis of other standards and bias assessments. Faculty at CME/CPD events may intentionally or unintentionally engage in peer selling of products, tools or devices if their presentations are not balanced and evidence informed. Peer selling in this respect cannot be included within accredited group learning activities included under Section 1 of the MOC program.</p>
	<p>30. If specific products or services are mentioned, there should be a balanced presentation of the prevailing body of scientific information on the product or service and of reasonable, alternative treatment options. If unapproved uses of a product or service are discussed, presenters must inform the audience of this fact.</p>	<p>Physician organizations are required to instruct faculty of their responsibility to ensure their presentations (and any recommendations) are balanced and reflect the current scientific literature. Unapproved use of products or services must be declared by faculty presenters. The only caveat to this guideline is where there is only one treatment or management strategy. Where appropriate, physician organizations should conduct content reviews of presentations where the likelihood of commercial bias is assessed to be high.</p>
<p>23. Negotiations for promotional displays at CME/CPD functions should not be influenced by industry sponsorship of the activity. It is preferable that promotional displays not be in the same room as the educational activity.</p>	<p>31. Negotiations for promotional displays at CME/CPD functions should not be influenced by industry sponsorship of the activity. Promotional displays should not be in the same room as the educational activity.</p>	<p>Promotional displays must not be placed in rooms, outside the rooms or in areas where educational activities are being conducted. Promotional displays should include only materials approved by the physician organizers.</p>

<p>24. Travel and accommodation arrangements, social events and venues for industry-sponsored CME/CPD activities should be in keeping with the arrangements that would normally be made without industry sponsorship. For example, the industry sponsor should not pay for travel or lodging costs or for other personal expenses of physicians attending a CME/CPD event. Subsidies for hospitality should not be accepted outside of modest meals or social events that are held as part of a conference or meeting. However, faculty at CME/CPD events may accept reasonable honoraria and reimbursement for travel, lodging and meal expenses. Scholarships or other special funds to permit medical students, residents and Fellows to attend educational events are permissible as long as the selection of recipients of these funds is made by their academic institution.</p>	<p>32. Travel and accommodation arrangements, social events and venues for industry sponsored CME/CPD activities should be in keeping with the arrangements that would normally be made without industry sponsorship. For example, the industry sponsor should not pay for travel or lodging costs or for other personal expenses of physicians attending a CME/CPD event. Subsidies for hospitality should not be accepted outside of modest meals or social events that are held as part of a conference or meeting.</p> <p>Hospitality and other arrangements should not be subsidized by sponsors for personal guests of attendees or faculty, including spouses or family members.</p> <p>33. Faculty at CME/CPD events may accept reasonable honoraria and reimbursement for travel, lodging and meal expenses. All attendees at an event cannot be designated faculty. Faculty indicates a presenter who prepares and presents a substantive educational session in an area where they are a recognized expert or authority.</p>	<p>All accredited group CME/CPD events cannot provide funding for physicians or their families to travel to attend events or to pay for their lodging or other related costs. Faculty who present at accredited CME/CPD events can receive financial support for travel, lodging and honoraria (where appropriate). Physician organizations are accountable and responsible to ensure that all hospitality and other arrangements are modest and do not compete in any way with planned educational activities.</p> <p>Hospitality and other social arrangements must not be subsidized by sponsors for personal guests of attendees or faculty, including spouses or family members.</p> <p>The payment of honoraria, travel, lodging and meal expenses for faculty presenting at an accredited group CME/CPD event is the responsibility of the physician organization. The RCPSC agrees with the definition of faculty provided in the 2007 CMA guidelines</p>
<p>Electronic Continuing Professional Development (eCPD)</p>		
<p>No equivalent</p>	<p>34. The same general principles which apply to “live, in person” CPD events, as outlined above, also apply to eCPD (or any other written curriculum-based CPD) modules. The term “eCPD” generally refers to accredited on-line or internet-based CPD content or modules. However, the following principles can also apply to any type of written curriculum based CPD.</p>	<p>All eCPD events that are included under Section 1 must meet all of the organizational, educational, and ethical standards required for face to face CME/CPD events. Because of the unique nature of group CME delivered on-line the Royal College in collaboration with the University Offices of CME and the National Specialty Societies will develop a set of guidelines that will clarify issues related to how interactive learning will be promoted through an on-line media, when credits should be awarded etc. The Royal College does not accredit enduring materials.</p>
<p>No equivalent</p>	<p>35. Authors of eCPD modules are ultimately responsible for ensuring the content and validity of these modules and should ensure that they are both designed and delivered at arms'-length of any industry sponsors.</p>	<p>Authors of e-CPD modules are equivalent to faculty presenters at face to face CME/CPD events. Authors of e-CPD modules are accountable for the scientific validity and content of their modules. Physician organizations are responsible and accountable to ensure the ethical standards for group learning are adhered to within an e-CPD context.</p>
<p>No equivalent</p>	<p>36. Authors of eCPD modules should be physicians with a special expertise in the relevant clinical area and must declare any relationships with the sponsors of the module or any</p>	<p>Authors of e-CPD modules should be selected for their expertise in the subject area (clinical or non-clinical) being discussed. All authors and members of the planning</p>

	competing companies.	committee must declare all conflicts of interest (see item 24 above) at the beginning of the on-line event.
No equivalent	37. There should be no direct links to an industry or product website on any web page which contains eCPD material.	All accredited group e-CPD events must be free of any promotional displays or infomercials. If a link to any sponsor's web site is provided then physician participants must be informed that if they click on such a link they will leave the e-CPD host site completely and must log back in. Accredited group e-CPD included within Section 1 should include a link to MAINPORT to facilitate documentation of participation or for the development of personal learning projects stimulated by participation or completion of these modules.
No equivalent	38. Information related to any activity carried out by the eCPD participant should only be collected, used, displayed or disseminated with the express informed consent of that participant.	Participants must be informed and consent obtained (through the use of a consent form) for accredited group e-CPD events to use any participant information for any purpose other than collecting and storing participation in and completion of the e-CPD event. Use of personal information must comply with current privacy legislation.
No equivalent	39. The methodologies of studies cited in the eCPD module should be available to participants to allow them to evaluate the quality of the evidence discussed. Simply presenting abstracts that preclude the participant from evaluating the quality of evidence should be avoided. When the methods of cited studies are not available in the abstracts, they should be described in the body of the eCPD module.	Accredited group e-CPD events should provide participants with links to review studies that are presented or referred to during the presentation. In making this recommendation we recognize that it is not the responsibility of the CPD provider to pay for access to references that require a fee or subscription.
No equivalent	40. If the content of eCPD modules is changed, re-accreditation is required.	The accreditation of group eCPD modules based on the Medical Expert role can only be approved for one year. The sponsoring organization and authors must review and update the information and submit for review and approval by a recognized accredited CPD provider in Canada. Accredited group eCPD modules based on other CanMEDS Roles can be approved for durations of up to 3 years assuming that the content of the module has not changed. Changes to the module would require the sponsoring organization and authors to complete a review and update the module for review and/or approval by an accredited CPD provider recognized by the Royal College.

**Canadian Psychiatric Association
FACULTY DISCLOSURE FORM**

It is the policy of the Canadian Psychiatric Association to insure the balance, independence, objectivity and scientific rigour of all CPD activities. Anyone engaged in content development, planning or presentation must complete this form. Persons who do not complete this form may not participate in the CPD activity.

Title of CPD Event: _____

Title of Presentation: _____

Presentation Date: _____

Please indicate your role in this CPD event: Presenter Course Director
 Moderator Planning Committee Member

Name: _____

Title: _____

Phone: _____

E-mail: _____

DISCLOSURE

YES **NO** Have you (or your spouse/partner) had a financial relationship in the last 24 months with the manufacturer of a product or service mentioned in this program, or with the manufacturer of competing products or services?
 (See article 24 of *CMA Policy: Guidelines for Physicians in Interactions with Industry*)

If **NO**, skip to **DECLARATION** section below. If **YES**, list your disclosures and resolutions below.

Nature of Financial Interest/Affiliation	Response		Commercial Enterprise(s)
	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Ownership or partnership	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Employment	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Investments (mutual funds excluded)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Advisory board or similar committee	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Clinical trials or studies	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Honoraria or other fees (e.g., travel support)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Research grants	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Patents	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Other (specify):	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

RESOLUTION OF CONFLICT OF INTEREST

Presenter/Authors

- I will support my presentation and clinical recommendations with the "best available evidence" from the medical literature.
- I will refrain from making recommendations regarding products or services, e.g., limit presentation to pathophysiology, diagnosis and/or research findings.
- I will recommend an alternative presenter for this topic for the planning committee's consideration.
- I will submit my talk in advance to allow for adequate peer review.
- I will or have divested myself of this financial relationship.

Planners

- To the best of my ability, I will ensure that any speakers or content I suggest is independent of commercial bias.
- I will recuse myself from planning activity content in which I have a conflict of interest.

DECLARATION

I will uphold academic standards to insure balance, independence, objectivity and scientific rigour in my role in the planning, development or presentation of this CME activity.

Signature: _____ Date: _____

Additional information may be requested to resolve any conflict of interest. All identified conflicts will be resolved, and disclosure will be made to activity participants.

**Canadian Psychiatric Association
PEER REVIEWER/PHYSICIAN ASSESSOR DISCLOSURE FORM**

It is the policy of the Canadian Psychiatric Association to insure the balance, independence, objectivity and scientific rigour of all CPD activities. Anyone engaged in the peer review or final assessment of CPD activities must complete this form. Persons who do not complete this form may not participate as reviewers or assessors of the CPD activity.

Title of CPD Event: _____

Title of Presentation: _____

Presentation Date: _____

Please indicate your role in this CPD event: Peer Reviewer
 Physician Assessor

Name: _____

Title: _____

Phone: _____

E-mail: _____

DISCLOSURE

YES **NO** Have you (or your spouse/partner) had a financial relationship in the last 24 months with the manufacturer of a product or service mentioned in this program, or with the manufacturer of competing products or services?
 (See article 24 of *CMA Policy: Guidelines for Physicians in Interactions with Industry*)

If **NO**, skip to **DECLARATION** section below. If **YES**, list your disclosures and resolutions below.

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Ownership or partnership	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Employment	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Investments (mutual funds excluded)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Advisory board or similar committee	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Clinical trials or studies	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Honoraria or other fees (e.g., travel support)	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Research grants	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Patents	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Other (specify):	<input type="checkbox"/> Yes	<input type="checkbox"/> No	

RESOLUTION OF CONFLICT OF INTEREST

Peer Reviewers and Assessors

- To the best of my ability, I will ensure that any changes to content I suggest are independent of commercial bias and that recommendations are supported by the "best available evidence" from the medical literature.
- I will recommend an alternate peer reviewer/assessor for this topic for the CPA's consideration.
- I will or have divested myself of this financial relationship.
- I will recuse myself from reviewing content in which I have a conflict of interest.

DECLARATION

I will uphold academic standards to insure balance, independence, objectivity and scientific rigour in my role in the peer review or final assessment of this CPD activity.

Signature: _____ Date: _____

Additional information may be requested to resolve any conflict of interest.

From the Royal College's Spring 2009 CPD Accreditation Bulletin:

Sponsorship Recognition and 'Tagging'

Tagging is the linking of sponsorship funding to a specific session within an accredited group learning event. Beginning in 2010, tagging will no longer be allowed at accredited group learning events; all sponsorship funds for accredited group learning events must be received as an unrestricted educational grant and included as a source of revenue within the overall budget supporting the event in its entirety.

All organizations providing unrestricted educational grants must be acknowledged as supporting the entire event. As an example, a summary page can be created recognizing the contribution of all sponsors.

Non-educational activities may be 'tagged' but must not be included as part of an accredited group learning event. For example, a breakfast can be tagged, if it is strictly a meal function and is not included as part of the program.