



Policy on Internet CPD or Online Education

Live or enduring material activities that are provided via the Internet are considered to be “Internet CPD”. Internet CPD must comply with all College of Family Physicians of Canada and Royal College of Physicians and Surgeons of Canada Policy (including the Standards for Commercial Support) Accreditation Policies, and CPD Policies. However, there are special requirements for Internet CPD because of the nature of the activities:

Activity Location: Accredited providers may not place their CPD activities on a pharmaceutical or device manufacturer’s product website.

Links to Product Websites: With clear notification that the learner is leaving the educational website, links from the website of an accredited provider to the homepage of pharmaceutical and device manufacturers’ product websites are permitted before or after the educational content of a CPD activity, but shall not be embedded in the educational content of a CPD activity.

Advertising: Product advertising of any type is prohibited within the educational content of CPD activities on the Internet including, but not limited to, banner ads, subliminal ads, and pop-up window ads. For computer-based CPD activities, advertisements and promotional materials may not be visible on the screen at the same time as the CPD content and may not be interleaved between computer ‘windows’ or screens of the CPD content.

Provider Contact Information: The accredited provider must have a mechanism in place for the learner to be able to contact the provider if there are questions about the Internet CPD activity.

Policy on Privacy and Confidentiality: The accredited provider must have, adhere to, and inform the learner about its policy on privacy and confidentiality that relates to the CPD activities it provides on the Internet. (See Privacy Policy <http://healthsci.queensu.ca/education/cpd/policies/privacy>)

Copyright: The accredited provider must be able to document that it owns the copyright for, or has received permissions for use of, or is otherwise permitted to use copyrighted materials within a CPD activity on the Internet. (See our Copyright Policy)

Approved by Faculty Board: February 1, 2008

Revision Approved by Faculty Board Executive: June 13, 2012

Revised by CPD Advisory Committee: December 7, 2016 and March 8, 2017

Revision Approved by Faculty Board Executive:



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Revised by CPD Advisory Committee: December 7, 2016 and March 8, 2017

Revision Approved by Faculty Board Executive:

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Policy on Copyright

These guidelines have been issued to provide staff and faculty with a framework which they can use with respect to copyright. The guidelines are not intended to be definitive and in case of uncertainty, please refer to the [Canadian Copyright Act](#) for clarity.

The Canadian Copyright Act

Infringement generally

27 (1) It is an infringement of copyright for any person to do, without the consent of the owner of the copyright, anything that by this Act only the owner of the copyright has the right to do.

Marginal note: Secondary infringement

(2) It is an infringement of copyright for any person to

[...]

a copy of a work, sound recording or fixation of a performer's performance or of a communication signal that the person knows or should have known infringes copyright or would infringe copyright if it had been made in Canada by the person who made it.

29 Fair dealing for the purpose of research, private study, education [...] does not infringe copyright.

Copyright is defined as the right to copy. It is the exclusive right of the creator of the original work, unless that right is waived.

Copyright protection is extended automatically to works upon their creation. It is important to note that the work need not state it is copyrighted to be protected.

The following rights are the exclusive rights of the owners of copyright:

- The right to make copies
- The right to assign or license the use of a work
- Distribution rights
- Adaptation rights
- Public performance rights
- Moral rights

Works Protected by Copyright

Original works whatever may be the mode or form of their expression including, but not limited to: books, letters (whether business or personal), photographs, portraits,



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musical works, sound recordings, audio-visual works, computer programs, newspaper, magazine, or journal articles. As a general rule, these works are protected during the lifetime of the author, and for 50 years after the author's death.

Internet Implications

1) Using any portion of a web page which is clearly associated with an individual or institution and making this material available on the Internet as part of one's own web page(s), without the express written permission of the author of such material, is a breach of copyright.

2) It is a breach of copyright to alter, in any way, material taken from the Internet, as well as other materials covered by copyright, and to make this material available in altered form on the Internet, without the express written permission of the author.

3) Scanning documents mentioned under Works Protected by Copyright (above), or using materials mentioned under Works Protected by Copyright (above) and including this material in a Personal Web Page which will be made available on the Internet, without the express written permission of the author, is a breach of copyright.

4) E-mail (whether personal or business) is protected by copyright, and subject to the provisions of the Canadian Copyright Act as noted above.

It is up to each individual to ensure that they have a legitimate right to the material they use.

See also:

- Copyright Act (R.S. 1985, c. C-42)
- BILL C-48: AN ACT TO AMEND THE COPYRIGHT ACT
- Internet Content-Related Liability Study / Industry Canada

CPD would like to acknowledge the CMPA for their information regarding the use of clinical photography and video for educational purposes. Please visit the following link for more information:

https://www.cmpa-acpm.ca/en/duties-and-responsibilities/-/asset_publisher/bFaUiyQG069N/content/using-clinical-photography-and-video-for-educational-purposes

Queen's University on Fair Dealing <http://library.queensu.ca/copyright/fair-dealing-policy>

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Revision Approved by Faculty Board Executive:



Recommend removing this policy and using a shortened version content on our “about us” page to define “what is CPD”, with a link to our accreditation page.

The following has been added to the CPD “About Us” webpage:

The content of Continuing Professional Development activities consists of scientific and applied education involving healthcare information known and accepted by healthcare practitioners, with the intention to inform best practices as it relates to human beings aimed to benefit the overall discipline of health sciences, and delivery of care in its multitude of forms. Continuing education activities apply exclusively to healthcare practitioners which are designed to guide said individuals in carrying out their professional responsibilities more effectively, and achieve competency in assorted healthcare subject matters.

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Policy on CPD Content

Continuing professional development consists of educational activities which serve to maintain, develop, or increase the knowledge, skills, and professional performance and relationships that a health care professional uses to provide services for patients, the public, or the profession. The content of CPD is that body of knowledge and skills generally recognized and accepted by the profession as within the basic health care sciences relating to humans, the discipline of clinical health practice, and the provision of health care to the public.

A broad definition of CPD, such as the one found above, recognizes that all continuing educational activities, which assist health care professionals in carrying out their professional responsibilities more effectively and efficiently are CPD. A course in management would be appropriate CPD for health care professionals responsible for managing a health care facility; a course in educational methodology would be appropriate CPD for health care professionals teaching in a medical school; a course in practice management would be appropriate CPD for practitioners interested in providing better service to patients.

Not all continuing educational activities which health care professionals may engage in, however, are CPD. Health care professionals may participate in worthwhile continuing educational activities which are not related directly to their professional work and these activities are not CPD. Continuing educational activities which respond to a health care professional’s non-professional educational need or interest, such as personal financial planning or appreciation of literature or music, are not CPD.

CPD that discusses issues related to coding and reimbursement in a medical practice falls within the definition of CPD.



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Queen's CPD Office's principle focus is on continuing health practice education with the Queen's Faculty Development Office focusing on professional development activities.

Providers are not eligible for accreditation or re-accreditation if they present activities that promote recommendations, treatment or manners of practicing medicine that are not within the definition of CPD, or are known to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients. An organization whose program of CPD is devoted to advocacy of unscientific modalities of diagnosis or therapy is not eligible to apply for accreditation.

Furthermore, Queen's University, office of CPD, will choose credentialed speakers who will write the learning objectives. The speaker will be instructed to abide by the following:

- 1) Disclosure to the audience of any potential conflict of interest. Please refer to our Conflict of Interest Policy.
- 2) Declaration of any off label uses referred to in their presentation, inclusive of therapeutic agents, medical devices and complementary and alternative techniques. Discussion of any off-label medication use or complementary techniques should include evidence-informed practice.
- 3) Presentation of information that is balanced, independent, objective and scientifically rigorous.

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It is up to each individual to ensure that they have a legitimate right to the material they use.

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See also:

- Copyright Act (R.S. 1985, c. C-42)
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https://www.cmpa-acpm.ca/en/duties-and-responsibilities/-/asset_publisher/bFaUiyQG069N/content/using-clinical-photography-and-video-for-educational-purposes

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[Queen's University on Fair Dealing http://library.queensu.ca/copyright/fair-dealing-policy](http://library.queensu.ca/copyright/fair-dealing-policy)

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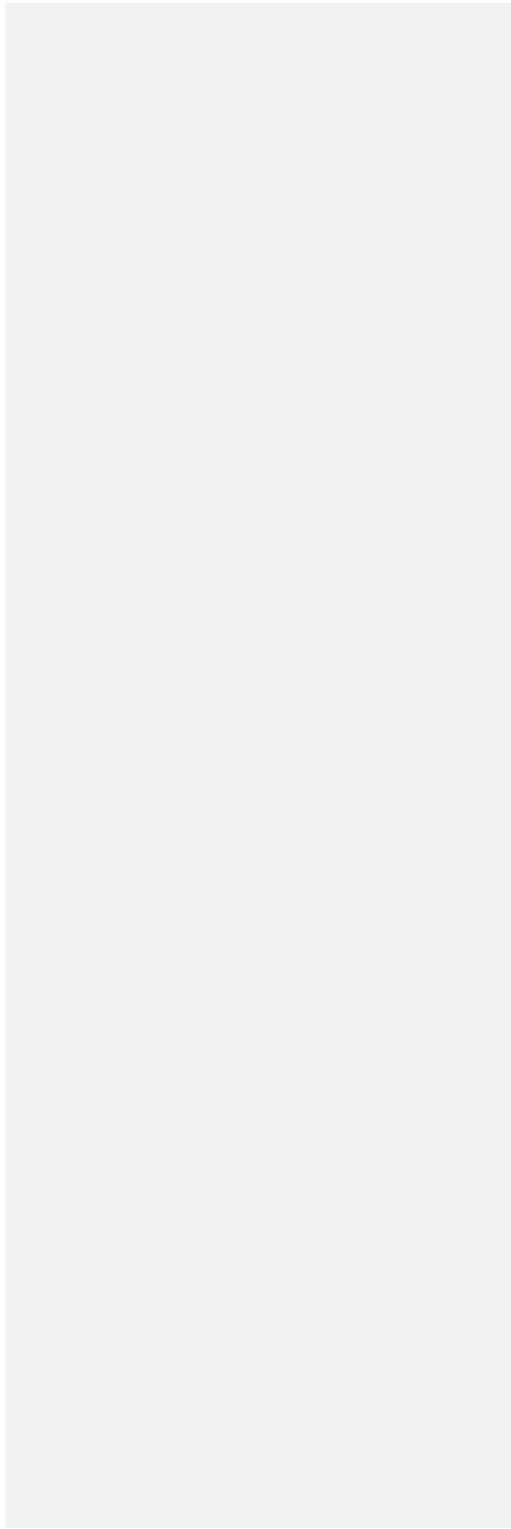


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Continuing Professional Development

Revision Approved by Faculty Board Executive:



Section 27(1):

Section 27(1):“Copyright in a work shall be deemed to be infringed by any person who, without the consent of the owner of the copyright, does anything by this Act, only the owner of the copyright has the right to do.” [See Owners’ Rights below.]

*Section 27(2)***The following acts do not constitute an infringement of copyright:**

- Section 27(2) Any fair dealing with any work for the purposes of: private study, research, criticism, review or newspaper summary.

Supplementary Information



Draft Aug 2016

Policy on Disclosure of Potential Conflicts of Interest

In principle, the audience for any educational initiatives should be aware of any existing or potentially existing conflict of interest of speakers or planning committee members who influence the educational content by way of presentation or planning. The aim of the CPD Office is to develop, accredit, and deliver programs that are as free from partiality and bias as possible. The Queen's CPD Office strives to ensure that continuing health education events and related programming materials and otherwise provide balance, independence, objectivity and scientific rigor without prejudice. However, in some events, such as sponsored visiting lectureships or conferences underwritten by educational grants originating from industry, there is an explicit acknowledgement of the nature of the sponsorship. In receipt of this knowledge, an audience can evaluate the subject matter of the presentations or teaching accordingly. In the nature of full disclosure, there may be unidentified relationships with industry, that members of the Faculty can legitimately maintain, which are not as readily visible and may yet give a perception of bias. Such relationships can include, but are not limited to, holding stock in pharmaceutical companies, involvement with industry advisory boards, or participation in industry-sponsored clinical research.

To appropriately inform audiences participating in Queen's University Continuing Professional Development events, the Continuing Professional Development Advisory Committee requires that speakers disclose any involvement with industry that may potentially influence the presentation of the educational material.

[Reference: CMA Policy: Guidelines for Physicians in Interactions with Industry (Update 2007) Principle #24.]

Disclosure will be done verbally, using a slide or a handout at the beginning of a presentation. The existence of commercial or financial interests of speakers should not be taken as implying bias but help participants form their own judgments. Examples of relationships, which should be disclosed include but are not limited to:

- any direct financial interest in a company whose interests are in the area(s) covered by the educational material ("the Company")
- investments held by the speaker in the Company
- membership on the Company's Advisory Board or similar committee
- current or recent participation in a clinical trial sponsored by the Company
- assisting in the design of clinical studies concerning the use of products manufactured by the Company.
- participating in clinical studies using products produced by the Company.
- research by the speaker sponsored by the Company

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- paid speaker by the Company.
- the speaker holds a patent for a product referred to in the presentation or marketed by the Company

To ensure that audiences receive complete information, speakers who have no involvement with industry should inform the audience that they have nothing to disclose, i.e., cannot identify any potential conflict of interest.

Where programs are logistically managed by the Office of Continuing Professional Development, speakers will be reminded to prepare disclosure statements and include them in their presentations, and it is recommended that this practice be followed by all Faculty members engaging in CPD activity, regardless of organizer.

Program brochures and handout material should include the following statement: "In keeping with accreditation guidelines, speakers participating in this event are required to disclose to the audience any involvement with industry or other organizations that may potentially influence the presentation of the educational material. Disclosure may be done verbally or using a slide or handout."

Reference:

Guidelines for Physicians In Interactions With Industry (Update 2007),

<http://policybase.cma.ca/dbtw-wpd/Policypdf/PD08-01.pdf>

We acknowledge the work done by Dalhousie's CME Department who created the prototype for this policy. Date: August 17, 2001.

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Continuing Professional Development

FACULTY OF HEALTH SCIENCES

Policy on Logo and Name Usage

CPD is characterized as the education (online, conferences and pre-approved programming) of healthcare professionals available after the completion of formal training. CPD activities include any educational activities which serve to maintain, develop or increase knowledge, skills, competency, behaviour or performance of a healthcare provider with the goal to supply better service for patients, the public or the profession with healthcare professionals as the target audience.

CPD has a mandate to support Schools, Departments and Programs in the planning, design, development, organization and successful delivery of CPD activities. CPD is required to maintain accreditation by CACME (The Committee on Accreditation for accreditation of Continuing Medical Education).

The use of the University/FHS Name and/or Logo on CPD activities gives an educational program and its content greater credibility and thus increased value to its participants. The use of the Name/Logo also suggests University/Faculty oversight and endorsement.

*Adapted from McMaster University's policy on Logo and Name Usage.

The Queen's University logo and the Queen's CPD logo, as shown above, are branding/service marks of Queen's University. Queen's owns a number of identifying marks, the use of which is strictly controlled and protected under the Trademarks Act of Canada such as the Queen's logo/crest and the word marks "Queen's," and "Queen's University", "Tricolour" and "Gaels". These word marks are marks of the University regardless of the particular style in which they are printed or used (ref. <http://www.queensu.ca/studentaffairs/trademark-licensing>). When used for the purposes of Continuing Professional Development programs, logos may be used only in accordance with the Visual Identity guidelines published by Queen's University (<http://queensu.ca/identity/guide>) and the guidelines as articulated below for the CPD logo. It is strictly prohibited to use the Queen's logo in any manner that could constitute promotion of a commercial product. This would include the use of the logo for any advertising or presentation of a CPD activity that is not accredited, certified or endorsed by a Queen's department or office. Examples of acceptable logo use includes, but is not limited to: brochures, email signatures, web pages, audio visual presentations, registration forms, agendas, etc.

The CPD Office provides guidance on Health Education programming, ensuring coordination, consistency and centralizing of CPD. The Office of Continuing Professional Development name or logo is associated with programs offering the following levels of support:

- 1) The Office of Continuing Professional Development can review the program to assist in meeting the accreditation criteria of the CFPC and/or the RCPSC.

2) The Office of Continuing Professional Development can assist in the coordination, organization and implementation of the program inclusive of ensuring the program meets appropriate accreditation criteria.

All CPD programming wishing to use the Queen's University CPD name or logo must be accredited, certified or endorsed by the Queen's University Office of Continuing Professional Development prior to use. If you are unsure whether or not you have correctly employed the CPD logo, please contact us prior to usage for clarification. Unacceptable usage of the CPD and/or affiliated Queen's logo are subject to repercussion on a case by case basis.

Please contact CPD for further information http://healthsci.queensu.ca/education/cpd/contact_us

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Comment [RC1]: Two comments: I think we should have consistency in using CPD and CHSE. From how I read it, CHSE would be the activity and CPD would be the office.

In this section, are we suggesting that to use the CPD logo, it would need to be accredited, certified or endorsed by the CPD office? What about using the Queen's logo alone? While I agree that the activity needs to be accredited, certified or endorsed, it would not be clear who would need to do this.

Comment [KK2]: Agree with both comments – will make use of "CPD" consistent and have reworded this section for clarity.

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Policy on Privacy re. Collection of Personal Contact Information

Queen's University is governed by FIPPA ([Freedom of Information and Protection of Privacy Act](#): <https://www.ontario.ca/laws/statute/90f31>).

Queen's University collects personal information such as e-mail addresses, profession, home address etc. about our participants for the purposes of:

- 1) enabling online education
- 2) enabling notification of future educational related events. Participants must choose to both subscribe to all newsletter communications and have an option to unsubscribe. There is an exception to this law in cases where the audience is internal to Queen's.
- 3) enabling registration and contact details for payment follow-up should there be rejected payment(s)
- 4) evaluation of programs and program planning
- 5) Customization of program for audience

Queen's University will protect and retain personal contact information for seven (7) years in a secure manner unless individual participants request otherwise.

Any and all information collected for research or scholarship activities is governed by the [Health Sciences Research Ethics Board](#). <http://www.queensu.ca/urs/ethics/health-sciences-and-affiliated-teaching-hospitals-research-ethics-board-hsreb>

If a participant has any further questions, he/she should contact the FIPPA contact: <http://www.queensu.ca/accessandprivacy/contact>

See Also

Queen's University Record Management Policy <http://archives.queensu.ca/records-management/policy>

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Ms. Jessie Griffin



Continuing Professional Development

FACULTY OF HEALTH SCIENCES

Policy on Refunds and Cancellations

An administration fee will be retained or billed for registrations cancelled with late notice. In most cases, a cancellation fee of \$75.00 will be retained if canceled with less than 48 hours' notice; no refunds will be provided for any programs cancelled with less than 24 hours' notice. If any programs deviate from this policy, the program web page will outline the specific details to learners prior to their completing registration.

Presented to the CPD Advisory Committee: March 8, 2017

Approved by Faculty Board Executive:



Policy on Records Retention

The purpose of this policy is to ensure compliance with privacy and accreditation standards.

Specific CPD activity records are maintained by the Office of Continuing Professional Development, Queen's University. Records retention requirements relate to the following two topics:

1) Attendance Records: As an accredited provider, the Office of Continuing Professional Development, Queen's University will ensure mechanisms are in place to record, store and, when authorized by the participating health care professional, verify records of participation for a minimum of 7 years from the date of the CPD activity. Mechanisms of storage include, electronic files which are password protected. Given the accreditation/certification cycles for health professionals, this will allow additional time for requests for verification of attendance after the closure of an accreditation/certification cycle.

2) Activity Documentation: The Office of Continuing Professional Development, Queen's University, will retain activity files/records of CPD activity planning and presentation for a minimum of 7 years. Maintenance of this documentation enables the provider to, at the time of re-accreditation, show CACME how the activities it provided during its current term of accreditation were compliant with all accrediting bodies, accreditation criteria (including the Standards for Commercial Support) and Accreditation Policies.

After 7 years, any hard copy records are shredded by a secure shredding company. When electronic copies are collected, they will be stored on encrypted devices or in password protected databases on approved Queen's servers, and they will be kept for a minimum of 7 years. Thereafter, data stored on physical hard drives may be destroyed as per university policy regarding digital disposal:

<http://www.queensu.ca/its/security/additional-security-services/hd-destruction-disposal>

Link to: Queen's University Record Management Policy

Original approved by Faculty Board: February 1, 2008

Revision Approved by Faculty Board Executive: June 13, 2012

Revised by CPD Advisory Committee: December 7, 2016 and March 8, 2017

Revision Approved by Faculty Board Executive: _____



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Social Media Guidelines

This document aims to outline CPD's intended use of social media tools such as, but not limited to, our website, Facebook, and Twitter, and inform social media collaborators of relevant policies and/or guidelines.

Purpose

CPD aims to use social media tools for the following purposes:

1. To inform the public of upcoming programs, online materials, and other resources, both internal (originating from our office) and external (from other CHE or CHE related organizations).
2. To collaborate and communicate with the public for the purposes of gathering information regarding needs assessment, and general feedback about the programs or materials we promote.

Responsiveness

CPD intends to promote all of our programs and resources using identified and unidentified social media tools, and to respond to feedback in a timely manner.

Policies and/or Guidelines

CPD expects social media collaborators to be aware of privacy, conduct and other relevant Queen's University policies and/or guidelines prior to engaging in online behaviour that involves CPD:

1. Collaborators may not post any material that is obscene, defamatory, profane, libelous, threatening, harassing, abusive, hateful, or embarrassing to another person or entity.
2. CPD reserves the right to moderate, discontinue, or delete a disruptive or defamatory post, insist upon adherence to applicable policy guidelines, determine what constitutes disruptive electronic behavior, and unsubscribe or block repeat offenders permanently without the intention of readmission.
3. Collaborators will not provide confidential or other proprietary information, and will obtain explicit written permission to publish or report on conversations that are intended to be private or internal to any organization.
4. Use of our social media tools to solicit business or distribute a commercial message is strictly prohibited without exception. Collaborators who work for a vendor or supplier are permitted to have their contact information, including URL of company websites listed, but may not post any sales information or solicitations on the site.
5. Collaborators should contact us regarding any concerns or complaints about the content posted rather than posting their concerns or complaints on the site.
6. Information obtained from a social media platform which requires a membership and/or signing on will not be used for research purposes without the participant's written consent (see also, Health Sciences and Affiliated Teaching Hospitals Research Ethics Board:



Continuing Professional Development

<http://www.queensu.ca/urs/ethics/health-sciences-and-affiliated-teaching-hospitals-research-ethics-board-hsreb>)

For further details on University guidelines for Social Media, see

<http://www.queensu.ca/socialmedia/guidelines>

For details on the Faculty of Health Sciences Social Media Policy, see:

http://healthsci.queensu.ca/home/policies_forms

Disclaimer:

1. Messages posted that link to external sites represent the views and opinions of the source of information and do not necessarily reflect CPD's policies or positions unless clearly labeled as such.
2. CPD assumes no responsibility for any content of posts from outside users and the ramifications of said posts.

Revised by CPD Advisory Committee: December 7, 2016 and March 8, 2017

Revision Approved by Faculty Board Executive:



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3. Collaborators will not provide confidential or other proprietary information, and will obtain explicit written permission to publish or report on conversations that are intended to be private or internal to any organization.
4. Use of our social media tools to solicit business or distribute a commercial message is strictly prohibited without exception. Collaborators who work for a vendor or supplier are permitted to have their contact information, including URL of company websites listed, but may not post any sales information or solicitations on the site.
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Continuing Professional Development

FACULTY OF HEALTH SCIENCES

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Revised by CPD Advisory Committee: December 7, 2016 and March 8, 2017

Revision Approved by Faculty Board Executive:

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Know and follow the Queen's University Code of Conduct.

Be familiar with CPD's policies such as our Copyright, CPD Content, and Disclosure of Potential Conflicts of Interest policies.



Policy on Support of CPD

This policy incorporates the following former Queen's CPD Policies:

1. Conflict of Interest
2. Support from Commercial Sources
3. CPD Content

When developing accredited and certified programs, the Continuing Professional Development Office is governed by the following policies:

- Queen's University Faculty of Health Sciences Policy on Conflict of Interest In Interactions With Industry (November 26, 2014): http://healthsci.queensu.ca/home/policies_forms
- National Standard for Support of Accredited CPD Activities: <http://www.royalcollege.ca/rcsite/cpd/providers/tools-resources-accredited-cpd-providers/national-standard-accredited-cpd-activities-e>
- CMA Guidelines for Physicians Interaction with Industry <http://policybase.cma.ca/dbtw-wpd/Policypdf/PD08-01.pdf>

Where the CPD Office endorses content, best practices will be employed:

- Scientific Planning Committee must include a representative of the healthcare practitioner target audience and Queen's Faculty, and must not include any industry representation
- Needs assessment data sources are used to guide content development
- The Scientific Planning Committee must determine the learning objectives, review and approve the final content to ensure:
 - Content is unbiased
 - Potential conflicts of interest are disclosed
 - Content is scientifically sound and relevant for the target audience

Reviewed by CPD Advisory Committee: December 7, 2016 and March 8, 2017

Approved by Faculty Board Executive:

Draft Aug 2016

Policy on Support of University-sponsored Continuing Education Activities from Commercial Sources

(Everything in the policy can be incorporated into the new policy on support for CPD)

Approved by Faculty Board: February 1, 2008

Revision Approved by Faculty Board Executive: June 13, 2012

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Introduction/Background

This document outlines Queen's University's policies pertaining to the support of continuing education activities or resources by commercial supporters (e.g. pharmaceutical companies, instrument and device manufacturers). Such activities or resources include but are not restricted to courses, conferences, workshops, University-approved rounds, Internet courses, and the production of learning resources, e.g. CDROM or videotape, designed for participation or use by health professional learners.

The following documents have been employed in the preparation of these statements and form the basis for these policies.

- 1) Canadian Medical Association Policy Summary on Physicians and the Pharmaceutical Industry.
- 2) Accreditation Council for Continuing Medical Education Standards for Commercial Support, 1992 (updated 2004).
- 3) American Medical Association Ethical Opinion on Gifts to Physicians from Industry, 1998.
- 4) Association of American Medical Colleges Guidelines for Faculty Involvement in Commercially Supported Continuing Medical Education, 1992
- 5) The Association of Faculties of Medicine of Canada (AFMC) Statement on Industry Funding of Medical Education, 2008. Commercial Support and Disclosure.

Definitions of Terms

Accreditation (applies to organizations only): The official recognition by the Council on Accreditation of CME that a medical school has undergone a review process and has proven its ability to plan, present and evaluate CE programs that meet recognized standards of quality. The Royal College of Physicians and Surgeons of Canada has an accreditation process for National Specialty Societies; The Committee on Accreditation of CME accredits Canadian Medical Schools' CE divisions.

Approval (applies to CE courses, events and educational resources): For the purposes of this policy, approval implies the successful review of an educational activity or resource by the program planning committee. Upon approval, the Office of Continuing Professional Development may assign credits of the College of Family Physicians of Canada, the Royal College of Physicians and Surgeons of Canada and the American Medical Association. Only approved CE events (or other activities) may use the name and logo of Queen's University and/or sponsoring Office of Continuing Professional Development.

Conference/Meeting: The American Medical Association Council on Ethical and Judicial Affairs defines a legitimate "conference" or "meeting" as any activity, held at an appropriate location, where "the gathering is primarily dedicated, in both time and effort, to promoting objective scientific and educational activities and discourse (one or more educational presentation(s) should be the highlight of the gathering), and the main incentive of bringing attendees together is to further their knowledge on the topic(s) being presented". These same principles will apply for education events such as noon-hour rounds and journal clubs.

Enduring materials: any printed or similar learning material such as a monograph, self assessment quiz or other item meant to provide educational information to learners.

Provider: Normally non-profit, physician-led organizations or groups planning and delivering CE or continuing professional development (CPD) activities. This definition excludes pharmaceutical companies or their advisory groups, medical and surgical supply companies, communication companies, and other for-profit organizations and ventures/activities.

Sponsor: The institution under whose auspices a course is being held. For Queen's University-approved courses, the sponsor includes the Office of Continuing Professional Development, generally in conjunction with the course director's department. Other sponsors may be hospitals, National Specialty Societies, associations or not-for-profit organizations (e.g. The Heart & Stroke Foundation).

Supporter: A company, organization, institution, government agency or other entity (for-profit or not-for-profit) which contributes financial resources to a CE course or other activity.

Teachers: Members of the Faculty of Health Sciences and/or School of Medicine and guest faculty invited by course directors as workshop leaders, lecturers and speakers. The term teachers may also be taken to mean small group facilitators, workshop leaders, and developers of educational resources such as web-based learning modules or printed materials.

Policy

1. Selection of Subjects/Clinical Areas

CE planners are strongly encouraged to use all available methods of determining needs, including reflection on the appropriateness, evidence and clinical burden regarding a specific disease, disorder or subject area, prior to any negotiation with potential commercial supporters.

Following this exercise, and to ensure scientific integrity, the selection of topics, speakers, course materials and enduring materials is entirely the responsibility of the course organizer. If a resource person is recommended by a commercial organization, he or she must be acceptable to the course director and his/her planning committee. In this way, CE providers may be assured that teachers deliver current, objective, scientifically rigorous, and expert coverage of the subject at hand. As a condition of contributing funds or services, a CE provider cannot be required to accept advice or services concerning the selection of teachers, authors, participants or other education matters, including content, from a commercial supporter as a condition of contributing funds or services. While not a regular custom, commercial supporter representatives may be permitted to assist in providing logistical support.

Specifically, the course planner must ensure that the following decisions are made free of bias from a commercial interest:

- a) Confirmation of CE needs
- b) Determination of educational objectives
- c) Selection and presentation of content
- d) Selection of all persons and organizations that will be in a position to control the content of the CE event

- e) Selection of educational methods
- f) Logistics associated with planning and hosting the event or activity
- g) Evaluation of the activity.

The invitation to participate in planning must emanate from the CE provider and/or sponsor, not from the commercial organization.

2. Extent and Nature of Commercial Support

As a general guiding principle, commercially supported social events at continuing education activities should not compete with, nor take precedence over, educational events. (See note 1.) Further, registrants' travel arrangements, hotel accommodation and other activities should be in keeping with arrangements normally made without commercial support. They must not be in the control of or handled by, commercial supporters. (See also Section 8.)

3. Disclosures

Examples of disclosures are:

- 1) Affiliations
- 2) Sponsorships
- 3) Honoraria
- 4) Monetary support
- 5) Participation/role/membership on advisory boards
- 6) Involvement in clinical trial
- 7) Stock options
- 8) Patents
- 9) Research grants

These must routinely be reported to the participants of a CE activity by Queen's University faculty and visiting speakers.

The Office of Continuing Professional Development is responsible for conveying to participants in writing, any potential conflicts relevant to the topic area of the presentation declared by their course faculty and/or any funding received by the course for their support. Faculty disclosures should cover relevant relationships for a period of two years prior to the course. Disclosures may be made in the course syllabus or handouts, and should be included as the first or second slide in the speakers' presentations. The speaker must address the slide. If there are no handouts or slides, a one-page summary of declared relationships should be distributed to participants.

To ensure that audiences receive complete information, speakers who have no involvement with industry should inform the audience that they have nothing to disclose, i.e., cannot identify any potential conflict of interest.

Program handout material will include the following statement: “In keeping with accreditation guidelines, speakers participating in this event must disclose to the audience any involvement with industry or other organizations that may potentially influence the presentation of the educational material. Disclosure may be done verbally or using a slide.”

4. Unbiased Presentation of Content

Topics chosen for presentation during a CE activity must not be product or promotion oriented, and presentations must give a balanced view of all relevant therapeutic options available. Use of generic names is required wherever possible. If trade names are employed, use of those of several companies is preferable to that of a single supporting company.

Under certain circumstances, balance may not be possible, in which case the rationale for the inclusion of a one-sided presentation should be explained to the participants (e.g., the discussion of a new product within a class of drugs, or a unique product for which there is no competitor, or in the instance of research presentations which focus on only one drug within a class and for which there is no drug class evidence). Use of Queen’s University or similar institutional logo or name in a manner that constitutes promotion of a product is prohibited.

All speaker and overall course evaluation forms should include a question concerning commercial bias, e.g., “Did the program avoid commercial bias or influence?” Compilations or summaries of evaluation forms must be made available to the CPD Office at the conclusion of each approved CE activity.

5. Commercial Displays

When commercial exhibits are part of the program, arrangements for these should be separately considered so as to not influence planning or interfere with the presentation of CE activities. A single commercial organization may support a course and provide a relevant exhibit of product information (e.g. product monographs, related research literature, empty product containers or boxes. Product samples are prohibited. Exhibits (including banners which name products) may not be placed in the same room as the educational event except when the locale does not afford adequate or appropriate space to keep the exhibiting displays separate from the educational event, whereby the exhibits may be included in the same room as the educational event but must not interfere with the presentation of the educational activity.

6. Registrant Issues

a) Registration Fees

A registration fee is generally required from all non-teaching participants, since it is preferable that registrants bear some responsibility for the program in order to avoid perceived or real influence on learning. Exceptions to this general rule include rounds, faculty development activities, and research-oriented programs or events.

Subsidies to underwrite the costs of continuing education conferences or professional meetings may contribute to the improvement of patient care and therefore are permissible. Since the giving of a subsidy directly to the physician by a commercial representative may create a relationship that could influence the use of the company’s products, such funds should be received only by the Office of Continuing Professional Development that will in turn use the money to reduce the conference

registration fee. It is ethically preferred that individual CME events be sponsored by more than one industry source. Single source sponsorship might be ethically permissible provided that either:

- Program development by a non-profit physician organization was completed prior to seeking sponsorship.
- A pre-event content review by an unbiased expert is available. (SCCPD)

b) Registration Lists

Prior to a Course: Privacy restrictions preclude the distribution of registration lists prior to courses to commercial supporters or attendees under any circumstances. Such lists may be made available to course organizers and teachers in order to make workshop assignments or for other educational purposes (e.g. sending precourse reading material).

Explicit consent from participants must be obtained before distribution of participant lists to either commercial sponsors or attendees.

c) Payments to Registrants

Course planners must avoid participating in arrangements through which inducements are offered to attend CE programs that might directly or indirectly influence participants' judgment of those products, procedures, devices, etc. that are subjects of the presentation. This includes accepting any support that may induce feelings of indebtedness and thereby affect objectivity. Specifically, commercial supporters may not subsidize or provide travel, lodging, honoraria, or personal expenses directly to practicing health professional attendees or their guests.

In the case of students, residents or fellows in accredited programs, commercial interests may support the participation of such learners by contributing to a scholarship fund. The selection of physician trainees and the expenditures of these funds are the responsibility of the course director and the relevant Postgraduate Program chair, director or designate.

7. Direction of Funds

All funds from a commercial source should be in the form of an educational grant payable to the institution or organization sponsoring the CME/CPD activity (e.g. Queen's University). Subsidies specifically designated for hospitality should not be accepted. The term "unrestricted" should be eliminated; instead, there should be a statement along the lines of "Funds in support of this CME activity were provided by _____ as an Educational Grant to _____. The funds were independently allocated and disbursed in accordance with current CMA guidelines (SCCPD).

8. Payment of Teachers

a) Queen's University Faculty

Faculty members may not be directly supported by, receive gifts from, or be supported by commercial organizations while taking part in Queen's University-sponsored CE activities.

Under exceptional circumstances and at CPD's discretion, a Queen's University faculty member may be paid for their contributions to CPD. At the discretion of the course director, expenses incurred in making a presentation (e.g. parking) may be allowed.

Additionally, exceptional circumstances may occasionally be recognized. For example, major or lengthy contributions to CE may be reimbursed according to departmental/divisional guidelines and this policy.

b) Guest Faculty/Speakers

It is appropriate for guest faculty at conferences or meetings to accept reasonable honoraria and to accept reimbursement for personal travel, lodging, and meal expenses. However, visiting speakers may not be paid directly by commercial organizations.

c) Token Consultation

Token consulting or advisory arrangements may not be used to justify the compensation of participating health professionals for their time or their travel, lodging, and other out-of-pocket expenses. (See 6c)

9. Acknowledgements

The following outlines ways in which CE may acknowledge commercial support in the following formats. Advertising for commercial products by name or by indication is not permitted.

- a) Course brochures: Educational grants are documented in course brochures under "Acknowledgements." Commercial supporters may not be listed in the schedule of activities, the list of faculty or on the front of brochures.
- b) Posters, flyers and one-page brochures: Acknowledgements may be listed at the bottom in an unobtrusive manner.
- c) Websites and other electronic formats: In a one-page or one-screen format, acknowledgements may be listed unobtrusively at the bottom; in a multi-page or multi-screen format, acknowledgements may not be on the main (home) page, on a list of faculty or with the learning activities. Advertisements and promotional materials must not be visible on the screen at the same time as the CPD content and not interleaved between computer "windows" or screens of the CPD content. Links to commercial supporters' home pages (but not to pages related to product) may be established, so long as disclaimers are clearly in place, indicating that Queen's University is not responsible for the linked content. "Pop-ups" are not allowed. Links must open a new window, leaving the educational site open in the background.
- d) In printed CE handouts or syllabi, advertisements and promotional materials may not be interleaved within the pages of the educational content. They may be inserted at the end of the syllabus, not facing any content, and clearly marked as advertising/promotion.
- e) Live activities: In live, face-to-face CE activities, advertisements and promotional materials may not be displayed or distributed in the educational rooms except when the locale does not afford adequate or appropriate space to keep the exhibiting displays separate from the educational event, whereby the exhibits may be included in the same room as the educational event. Providers may not allow representatives of commercial interests to engage in sales or promotional activities while in the CPD activity. Commercial supporters may be acknowledged on a slide by company name only.

Notes

(1) “Precedence” is not taken in this clause as implying ordering of social and educational activities, rather it is taken in the sense of importance and duration: Queen’s University-approved activities must give equal or greater weight to educational (vs. social) activities. For example, an event, which featured a cocktail reception and dinner and a lecture of shorter duration would not qualify for approval.

We acknowledge the work done by University of Toronto’s CME Department who created the prototype for this policy.