



## **COPE STANDARDS FOR COMMERCIAL SUPPORT (COPE SCS): Standards to Ensure Independence in CE Activities**

### **Standard 1: Independence**

**Standard 1.1** A CE provider must ensure that the following decisions were made free of the control of a commercial interest. (a) Identification 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; (e) Selection of educational methods; (f) Evaluation of the activity.

**Standard 1.2** A commercial interest cannot take the role of non-accredited partner in a joint Provider relationship.

### **Standard 2: Resolution of Personal Conflicts of Interest**

**Standard 2.1** The provider must be able to show that everyone who is in a position to control the content of an education activity has disclosed all relevant financial relationships with any commercial interest to the Provider. COPE defines "'relevant' financial relationships" as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

**Standard 2.2** An individual who refuses to disclose relevant financial relationships will be disqualified from being a planning committee member, a teacher, or an author of CE, and cannot have control of, or responsibility for, the development, management, presentation or evaluation of the CE activity.

**Standard 2.3** The provider must have implemented a mechanism to identify and resolve all conflicts of interest prior to the education activity being delivered to learners.

### **Standard 3: Appropriate Use of Commercial Support**

**Standard 3.1** The provider must make all decisions regarding the disposition and disbursement of commercial support.

**Standard 3.2** A provider cannot be required by a commercial interest to accept advice or services concerning teachers, authors, or participants or other education matters, including content, from a commercial interest as conditions of contributing funds or services.

**Standard 3.3** All commercial support associated with a CE activity must be given with the full knowledge and approval of the provider.

**Standard 3.4** The terms, conditions, and purposes of the commercial support must be documented in a written agreement between the commercial supporter that includes the provider and its educational partner(s). The agreement must include the provider, even if the support is given directly to the provider's educational partner or a joint provider.

**Standard 3.5** The written agreement must specify the commercial interest that is the source of commercial support.



**Standard 3.6** Both the commercial supporter and the provider must sign the written agreement between the commercial supporter and the provider.

**Standard 3.7** The provider must have written policies and procedures governing honoraria and reimbursement of out-of-pocket expenses for planners, teachers and authors.

**Standard 3.8** The provider, the joint provider, or designated educational partner must pay directly any teacher or author honoraria or reimbursement of out-of-pocket expenses in compliance with the provider's written policies and procedures.

**Standard 3.9** No other payment shall be given to the director of the activity, planning committee members, teachers or authors, joint sponsor, or any others involved with the supported activity.

**Standard 3.10** If teachers or authors are listed on the agenda as facilitating or conducting a presentation or session, but participate in the remainder of an educational event as a learner, their expenses can be reimbursed and honoraria can be paid for their teacher or author role only.

**Standard 3.11** Social events or meals at CE activities cannot compete with or take precedence over the educational events.

**Standard 3.12** The provider may not use commercial support to pay for travel, lodging, honoraria, or personal expenses for non-teacher or non-author participants of a CE activity. The provider may use commercial support to pay for travel, lodging, honoraria, or personal expenses for bona fide employees and volunteers of the provider, joint provider or educational partner.

**Standard 3.13** The provider must be able to produce accurate documentation detailing the receipt and expenditure of the commercial support.

#### **Standard 4: Appropriate Management of Associated Commercial Promotion**

**Standard 4.1** Arrangements for commercial exhibits or advertisements cannot influence planning or interfere with the presentation, nor can they be a condition of the provision of commercial support for CE activities.

**Standard 4.2** Product-promotion material or product-specific advertisement of any type is prohibited in or during CE activities. The juxtaposition of editorial and advertising material on the same products or subjects must be avoided. Live (staffed exhibits, presentations) or enduring (printed or electronic advertisements) promotional activities must be kept separate from CE.

- For print, advertisements and promotional materials will not be interleaved within the pages of the CE content. Advertisements and promotional materials may face the first or last pages of printed CE content as long as these materials are not related to the CE content they face and are not paid for by the commercial supporters of the CE activity.
- For computer based, advertisements and promotional materials will not be visible on the screen at the same time as the CE content and not interleaved between computer "windows" or screens of the CE content. Also, COPE providers may not place their CE activities on a website owned or controlled by a commercial interest. With clear notification that the learner is leaving the educational website, links from the website of



a COPE provider to pharmaceutical and device manufacturers' product websites are permitted before or after the educational content of a CE activity, but shall not be embedded in the educational content of a CE activity. Advertising of any type is prohibited within the educational content of CE activities on the internet including, but not limited to, banner ads, subliminal ads, and pop-up window ads. For computer based CE activities, advertisements and promotional materials may not be visible on the screen at the same time as the CE content and not interleaved between computer windows or screens of the CE content.

- For audio and video recording, advertisements and promotional materials will not be included within the CE. There will be no "commercial breaks."
- For live, face-to-face CE, advertisements and promotional materials cannot be displayed or distributed in the educational space immediately before, during, or after a CE activity. Providers cannot allow representatives of commercial interests to engage in sales or promotional activities while in the space or place of the CE activity.
- For Journal-based CE, none of the elements of journal-based CE can contain any advertising or product group messages of commercial interests. The learner must not encounter advertising within the pages of the article or within the pages of the related questions or evaluation materials.

**Standard 4.3** Educational materials that are part of a CE activity, such as slides, abstracts and handouts, cannot contain any advertising, corporate logo, trade name or a product-group message of a COPE-defined commercial interest.

**Standard 4.4** Print or electronic information distributed about the non-CE elements of a CE activity that are not directly related to the transfer of education to the learner, such as schedules and content descriptions, may include product-promotion material or product-specific advertisement.

**Standard 4.5** A provider cannot use a commercial interest as the agent providing a CE activity to learners, e.g., distribution of self-study CE activities or arranging for electronic access to CE activities.

## **Standard 5: Content and Format without Commercial Bias**

**Standard 5.1** The content or format of a CE activity or its related materials must promote improvements or quality in healthcare and not a specific proprietary business interest of a commercial interest.

**Standard 5.2** Presentations must give a balanced view of therapeutic options. Use of generic names will contribute to this impartiality. If the CE educational material or content includes trade names, where available trade names from several companies should be used, not just trade names from a single company.

## **Standard 6: Disclosures Relevant to Potential Commercial Bias**

**Standard 6.1** An individual must disclose to learners any relevant financial relationship(s), to include the following information: The name of the individual; The name of the commercial interest(s); The nature of the relationship the person has with each commercial interest.

**Standard 6.2** For an individual with no relevant financial relationship(s) the learners must be informed that no relevant financial relationship(s) exist.



**Standard 6.3** The source of all support from commercial interests must be disclosed to learners. When commercial support is "in-kind" the nature of the support must be disclosed to learners.

**Standard 6.4** 'Disclosure' must never include the use of a corporate logo, trade name or a product-group message of a COPE-defined commercial interest.

**Standard 6.5** A Provider must disclose the above information to learners prior to the beginning of the educational activity.

*\*COPE has adopted the ACCME® Standards for Commercial Support: Standards to Ensure Independence in CME Activities<sup>SM</sup> as COPE policy. Used with permission of the Accreditation Council for Continuing Medical Education (ACCME).*