



ENTITY <b>University of Wisconsin-Madison Interprofessional Continuing Education Partnership (ICEP): School of Medicine and Public Health, School of Nursing, and School of Pharmacy</b>	NUMBER <b>UW-ICEP CS</b>
MANUAL <b>Policy and Procedure</b>	EFFECTIVE DATE <b>10/1/2021</b>
SUBJECT <b>Policy on Commercial Support and Content Validation</b>	REVISED <b>9/13/2021</b>

**Purpose:**

Ensure that accredited continuing education is developed independent of the influence of ineligible companies and that support given does not result in commercial bias or commercial influence. This policy addresses ACCME Standards for Integrity and Independence in Accredited Continuing Education numbers 2, 4 and 5.

**Definitions:**

**CE:** Accredited continuing education activities.

**UW ICEP:** University of Wisconsin-Madison Interprofessional Continuing Education Partnership

**Advertising and**

**Exhibit Income:** Monies paid by commercial interests (ineligible companies) to providers for promotional purposes and are NOT considered commercial support.

**Ineligible Company:** A company whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

**Conflict of Interest:** Circumstances where an individual has an opportunity to affect CE content about products or services of a commercial interest with which he/she has a financial relationship

**Commercial Support:** Financial or in-kind support from ineligible companies.

**POLICY**

**1.0 Independence**

The UW ICEP conducts the following aspects of CE planning independently from the influence of ineligible companies and/or involvement of owners and employees of ineligible companies:

- 1.1 Identification of CE needs
- 1.2 Determination of educational objectives
- 1.3 Selection and presentation of content
- 1.4 Selection of all persons and organizations that will be in position to control the content of CE
- 1.5 Selection of educational methods
- 1.6 Evaluation of the activity

If technical input is required from the commercial interest relating to the content of CE activities, that input will be requested in writing and be subject to content validation processes.

- 1.7 A commercial interest cannot take the role of non-accredited partner in a joint provider relationship.

## **2.0 Decision-making and Disbursement of Commercial Support**

The UW ICEP makes all decisions regarding the receipt and disbursement of commercial support funds. All requests for commercial support must be reviewed by the University of Wisconsin–Madison via an ICEP member school before submission to the ineligible company. In order to prevent bias in the planning of the activity, applications for Commercial Support should not be submitted until the planning application is completed and approved.

- 3.1 **Conditions** – No prerequisite conditions will be allowed with regard to the receipt of commercial support funds.

### **3.2 Written Agreement Documenting Use of Funds**

- 3.2.1 A written letter of agreement (LOA) must be signed between the University of Wisconsin on behalf of UW ICEP and the ineligible company (or in the case of the involvement of a joint provider, a three-way version of an LOA may be utilized). 4.2

- 3.2.2 The terms, conditions, purpose of the commercial support, amount of grant or description of in-kind support, name of the ineligible company providing the support and the UW ICEP member school (and joint provider, if applicable) must be included in the written agreement. All parties must sign the LOA. The UW ICEP has developed a standard two-party and three-party LOA; however, it is acceptable to use LOAs from the ineligible company if all requirements are met. 4.2

- 3.2.3 Any grant fund received by an ineligible company shall be unrestricted as to its educational use; however, unused funds may be returned to the ineligible company as a condition of the grant.

- 3.2.4 Commercial support funds must be paid to the University of Wisconsin System Board of Regents unless the signed LOA explicitly directs the ineligible company to release some or all of the funds directly to a joint provider.

- 3.2.5 UW ICEP may sign on to an existing agreement between an accredited provider and a commercial supporter by indicated its acceptance of the terms, conditions, and amount of the commercial support received. 4.2

### **3.3 No Retroactive LOAs**

- 3.3.1 The written agreement must be fully executed (signed by all parties) prior to the start of the accredited education. 4.2

### **3.4 Expenditures and Expenses**

- 3.4.1 Ineligible companies will not pay directly for any of the expenses related to the education of the learners. 4.1.a

3.4.2 Commercial support may be used to fund honoraria and/or reimbursement of travel expenses of planners, faculty or others in control of content for their roles only. Honoraria and travel expenses will be paid directly by the UW ICEP member school or joint provider when specifically designated in the letter of agreement. Honoraria amounts are set and approved in accordance with the UW ICEP Honoraria Policy (see Honoraria Policy for details). 4.1.b

3.4.2 Ineligible companies will not enter into any other compensation arrangement with planners, faculty or managers relative to that CE activity.

3.4.3 Faculty and planners will only be reimbursed for expenses incurred for the portion of the CE activity in which they participate in a teaching or planning role. Expense amounts are reimbursed in accordance with the UW ICEP Honoraria Policy.

### **3.5 Expenditures for Learners**

3.5.1 No commercial support funds may be used to pay for travel, lodging, honoraria, or personal expenses for individual learners or groups of learners participating in an activity accredited by the UW ICEP. 4.1.c

3.5.2 Commercial support may be used to defray or eliminate the costs of education for *all* learners. 4.1.d

3.5.3 Social events at CE activities are limited to appropriate and modest meals or receptions associated with an activity.

### **3.6 Accountability**

The UW ICEP maintains detailed records of the receipt and disposition of all grants from ineligible companies included the amount or kind of support received and how it was used. 4.3

3.6.1 A budget is maintained and reconciled at the conclusion of all accredited activities. Both the preliminary and reconciled budgets are recorded and are available for inspection by Joint Accreditation and/or the ineligible company upon request. 4.3

## **4.0 Management of Associated Commercial Promotion**

4.0.1 UW ICEP will not share the names or contact information of learners with any ineligible company or its agents without the explicit consent of the individual learner. 2.4

4.1 The UW ICEP may accept advertisements and/or exhibits from ineligible companies associated with a CE activity.

4.2 Agreements to advertise or exhibit will not permit ineligible companies to:

- 4.2.1 Influence any decisions related to the planning, delivery, and evaluation of the education. 5.1.a
  - 4.2.2 Interfere with the presentation of the education 5.1.b
  - 4.2.3 The receipt of exhibit or advertisement funds will not be contingent on an ineligible company's financial support of a CE activity. 5.1.c
- 4.3 In order to ensure the learners can easily distinguish between accredited education and other activities advertising, exhibits, and non-accredited education developed by or with influence from an ineligible company or with planners or faculty with unmitigated financial relationship or any other form of promotion are kept separate from the CE activity, as follows:
- 4.3.1 For live activities, advertising, exhibits, non-accredited education developed by or with the influence from an ineligible company or with planners or faculty with unmitigated financial relationships will not occur in the accredited educational space within 30 minutes (before or after) the accredited education is delivered. Activities that are part of the event but are not accredited for continuing education will be clearly labeled and communicated as such. 5.2.a
  - 4.3.2 For print, online or digital continuing education: Learners will not be presented with marketing of any kind while engaged in the accredited education activity. Learners will 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. 5.2.b
  - 4.3.3 For audio and video activities, advertisements will not be included within the activity nor will there be any commercial breaks during which an advertisement may be shown or heard.
  - 4.3.4 For computer-based/internet activities, advertisements are prohibited within the educational content of the activity on the internet including, but not limited to, banner ads, subliminal ads, and pop-up window ads. In addition, advertisements will not be visible on the screen at the same time as the CE activity is on screen, nor will there be interleaving of advertisements between individual "windows" of the activity.

Education materials that are part of the accredited education (such as slides, abstracts, handouts, evaluation mechanisms, or disclosure information) will not contain any marketing produced by or for an ineligible company including corporate or product logos, trade name or product group messages.

Learners will be directed to access non-accredited content that is developed by or with the influence of ineligible companies via a unique link.

UW ICEP does not allow the use of ineligible company marketing in information distributed about accredited education that does not include educational content, such as schedules and logistical information.

UW ICEP will consider limited marketing of eligible companies in information distributed about accredited education, such as schedules and logistical information. Limited to brochure/activity marketing.

- 4.4 Program books at national specialty society meetings, however, which are not an actual part of a CE activity and/or part of the transfer of education to the learner, may contain product-promotion material or product specific advertisements.
- 4.5 The UW ICEP does not allow any representative of a commercial interest to distribute enduring CE activities or arrange for electronic access to any CE activity. However, flyers, brochures, and announcements related to marketing of an activity may be distributed by representatives of an ineligible company as long as the UW ICEP requests this in writing.

## 5.0 Content Validation (1)

- 5.0 All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning. 1.1
- 5.1 CE activities offered by the UW ICEP must give a fair and balanced view of diagnostic and therapeutic options. 1.1
- 5.2 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. 1.2
- 5.3 The specific proprietary interests of a commercial supporter are not promoted in CE activities provided by the UW ICEP, although products may be referenced in the context of a balanced presentation that is scientifically objective.
- 5.4 UW ICEP will clearly identify content within an activity or individual presentation that discusses, debates, and explores new and evolving topics. UW ICEP will 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. 1.3
- 5.5 UW ICEP does not allow activities or content that advocates for unscientific approaches to diagnosis or therapy, or education that 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. 1.4
- 5.6 UW ICEP uses generic, scientific names of medications and medical devices wherever possible and practical to promote impartiality. If a trade name of a medication or device is used in a CE activity, the first reference for all medications discussed in the activity should include the generic name together with the trade name, and subsequent references should use only the generic name.
- 5.7 UW ICEP does not allow activity faculty to actively promote or sell products or services that serve their professional or financial interests during an accredited activity. 2.2

## 6.0 Disclosures of Commercial Support

6.1 The UW ICEP discloses to learners the name(s) of ineligible company(ies) supporting the CE activity in advance of the start of the activity.

6.1.1 If the nature of the commercial support is an “in kind” contribution, the nature of that in-kind contribution is disclosed to the learner.

6.1.2 The language of the disclosure to learners will never include the product name, corporate or product logo, trade name or a product group message of the ineligible company.

**APPROVED: University of Wisconsin-Madison Interprofessional Continuing Education Partnership on 9  
13 2021**