

## CPD Approval for Live Events

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## 1. CPD Live Event Approval

### Introduction

The Federation of the Royal College of Physicians, based in the UK and with international reach, is a collaboration between Royal College of Physicians of Edinburgh, Royal College of Physicians and Surgeons of Glasgow and Royal College of Physicians of London. Collectively, the colleges represent more than 50,000 physicians worldwide. For physicians in the UK and globally, the colleges provide an invaluable professional network, opportunities to share best practice and ongoing educational opportunities.

The Federation develops and delivers services to support doctors at every stage of their careers, including:

- continuing professional development (CPD)
- examinations (Membership of the Royal Colleges of Physicians of the UK – MRCP(UK))
- training (Joint Royal Colleges of Physicians Training Board – JRCPTB).

As part of its CPD Scheme, the Federation offers external event approval for live events and webinars at regional, national and international level for over 35 specialties:

Acute Medicine · Allergy · Audiological Medicine · Cardiology · Clinical Genetics · Clinical Neurophysiology · Clinical Pharmacology & Therapeutics · Clinical Toxicology · Dermatology · Endocrinology & Diabetes Mellitus · Gastroenterology · General Medicine · Genito-Urinary Medicine · Geriatric Medicine · Haematology · Immunology · Infectious Diseases · Intensive Care Medicine · Medical Oncology · Medical Ophthalmology · Metabolic Medicine · Nephrology · Neurology · Nuclear Medicine · Paediatric Cardiology · Palliative Medicine · Rehabilitation Medicine · Renal Medicine · Respiratory Medicine · Rheumatology · Stroke Medicine · Tropical Medicine · Virology

For accreditation of events targeted towards Physician Associates; please refer to the [guidance](#) by the Faculty of Physician Associates.

### Approval criteria

The Federation approves only high quality CPD which can be clinical or non-clinical (examples of the latter include teaching, appraisal and leadership skills). When applying for CPD Approval, providers must ensure that all legal, medico-legal and ethical considerations have been met. These include copyright, patient consent for materials used and data protection.

1. **Any support, sponsorship, funding or involvement by a commercial organisation must be declared in the application.** Any competing interest on the part of the provider or contributors must also be declared.
2. **Any support, sponsorship, funding or involvement by commercial organisations must not influence the structure or content of the programme.** The programme will not be approved if there is apparent bias towards use of any commercial product that does not represent current evidence-based professional practice. If sponsorship or other support is provided this should comply with relevant guidelines (for example from the ABPI).

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- The target audience must fall within the remit of the Federation.** The target audience must be identified and fall within the remit of the Federation. We approve events primarily targeted towards Consultant and SAS grade Physicians. Provided the learning is appropriate for consultants and SAS grade physicians, the Federation will also approve events that are appropriate for trainees. The Federation also approves multiprofessional meetings where the target audience includes Consultant Physicians, SAS grade physicians and other healthcare professionals such as GPs and specialist nurses. Where the main target audience is not physicians but another medical specialty, you may wish to refer to the respective Royal College or equivalent. Please see [our website](#) for a list of Federation supported specialties.
- The learning objectives must be stated and be appropriate for the target audience.**
- The teaching methods used should be capable of delivering the stated learning objectives.** Key principles of adult learning should be incorporated to enhance knowledge, attitudes and skills and to develop understanding of content and context.
- There should be evidence that the presenters and/or facilitators have the expertise to deliver the learning objectives using the methods chosen.** For example, short relevant biographical details should be provided.

## **Involvement of pharmaceutical companies, device companies and other commercial organisations providing healthcare products:**

### **Sponsorship**

Sponsorship should be in the form of an (unrestricted) educational grant, that is, a grant that allows the provider(s) freedom to choose the topics, speakers and mode of presentation. The grant should be paid directly to the institution or organisation that is organising the CPD event or activity.

### **Additional points**

Providers should refer to [the guidelines](#) entitled 'Involvement of pharmaceutical companies, device companies and other commercial organisations providing healthcare products'.

### **The key points are:**

- The Federation no longer accepts applications for CPD approval that come directly from pharmaceutical companies, device companies and other commercial organisations that provide healthcare products used on patients. Since January 2024, the Federation does not accept applications from advertising, marketing or communication companies whose clients are pharmaceutical companies, device companies and other commercial organisations providing healthcare products used on patients.
- The Federation does not allow speakers or facilitators from the above companies at Federation-approved events, except where the criteria listed in that document are fulfilled. This is to ensure the independence of the CPD and is in line with international CPD accreditation standards.
- There should be no advertising or promotional activity during the educational programme at approved educational meetings.

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4. Where an event (live, streamed or 'on demand') has been sponsored by a company it should be declared early in the presentation. The disclosure should be a simple statement informing delegates that the event has been sponsored by the company concerned.
5. Events where the name of a sponsor is included in the title of the event will not be approved.
6. The Federation does not permit the use of company logos relating to the above organisations or their product logos during the educational programme at approved educational meetings.
7. 'Industry sessions' where a session at a meeting is sponsored by a specified commercial organisation will not be approved by the Federation. Such sessions must be clearly identified as not having Federation Approval.
8. Where funding is provided by a single organisation other than the provider (a single sponsor) there should be a programme director or programme committee chairperson who is completely independent of the organisation providing the funding.
9. Commercial organisation(s) providing funding to the CPD provider must not pay speakers directly or pay personal expenses to those attending the CPD (eg an honorarium, travel expenses, registration fees or accommodation).
10. Organisation(s) providing funding to the CPD provider must play no part in the selection of speakers.
11. The organisation(s) providing funding must not be provided with the contact details of the delegates.

## Diversity and inclusion

1. **Educational faculty (speakers).** The Federation requires providers to promote diversity and inclusion when selecting the faculty for their educational event(s). The faculty should adequately represent society. The Federation will not usually approve events where the faculty comes from a single gender or ethnic group unless there is a satisfactory reason for this.
2. **Educational content.** CPD providers should ensure that their learning material reflects the diversity of patients. The learning material should reflect the diversity in patterns of disease and symptomatology between certain patient groups and the differing response to certain forms of treatment.
3. **Learners.** The differing needs of learners should be considered when considering the structure and content of the event.

## Artificial Intelligence (AI) in live and live-streamed event approval

### 1. Disclosure

Speakers must disclose and describe the use of AI technologies if used in their research or presentation and also in any key sources that are used to develop the content of the presentation, to the best of their knowledge.

### 2. Virtual presentations where the speaker is generated by AI

These will not be approved. An exception may be made for brief demonstration of the use of AI as part of a presentation by a human.

### 3. Responsibility for content produced or influenced by AI technology

If AI is used within CPD learning materials, the responsibility for the information included rests with the human speaker for its accuracy and balance.

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## Sponsorship

Sponsorship of a speaker, research or e-learning by a company that develops AI technologies should be disclosed.

## 2. Application Process

### Before applying

- If you would like to apply for approval online, please contact the CPD Team at [CPDapproval@thefederation.uk](mailto:CPDapproval@thefederation.uk) with a copy of your completed provider account application [form](#). Once you have been successfully setup the team will advise your provider username and password by email.
- Make sure your event is submitted at least two months in advance of the meeting date. As of **31<sup>st</sup> March 2024** we no longer accept retrospective applications which are submitted after the event date.

### Filling out the application

Please ensure you submit a complete application by including the following information in the noted steps.

- **Number of CPD credits** (Step 1): 1 hour of learning = 1 credit.  
Please note that the maximum number of credits is 8 per day. Registration, refreshment breaks, and time spent in the commercial exhibition or meeting commercial representatives cannot be included. Business meetings within an event would not usually be counted.
- **Date and Venue Details** (Step 2): List the first day of each event; if you are running the same event more than once you can list the first date for each event if the speakers or speaker faculty and content are the same.
- **Audience Locale** (Step 3): Events may be regional, national or international, but 'Local' will not be accepted. However, where a non-clinical course is provided by one or more external educational provider(s) in a single health organisation the Federation will consider allowing external non-clinical credits. Please note the guidance relating to international events in section 7 of this document.
- **Learning Objectives** (Step 3): A learning objective is a statement that describes what the learners will be able to do at the end of the session that they may not be able to do at the beginning. There must be at least two.
- **Target Audience** (Step 4): The target audience must be identified and fall within the remit of the Federation. We approve events primarily targeted towards Consultant and SAS grade Physicians. Provided the learning is appropriate for consultants and SAS grade physicians, the Federation will also approve events that are appropriate for trainees. The Federation also approves multi-professional meetings where the target audience includes Consultant Physicians, SAS grade physicians and other healthcare professionals such as GPs and specialist nurses. Where the main target audience is not physicians but another medical specialty, you may wish to refer to the respective Royal College or equivalent.

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- **Sponsors (Step 5):** The main sponsors should be confirmed before submission.
- **File Uploads (Step 6): Mandatory documents to upload include:**
  1. CPD Declaration of Interests Form and Programme Director's Declaration
  2. Short speaker biographies  
For large clinical events with 10 or more speakers, we will accept a minimum data set of:
    - Speaker's name
    - Speaker's main employing organisation
    - Speaker's role in that organisation
  3. Programme with session times, and speakers' names and organisations.

### 3. Fees

Please refer to the [fee document](#) for all CPD events.

#### Making payment

- **Payment must be received for each application before we can process it for CPD approval. Your application is not complete without it. We strongly recommend that you make the payment by credit or debit card online. Cheques are no longer accepted.**
- If paying by BACS via your finance department we strongly recommend you ask for 'fast track' or 'urgent' payment unless you know that a routine request for payment will be actioned within 2 weeks. Delayed payment may result in delayed approval.
- If paying by BACS, please use the Federation bank details on the generated invoice on the CPD system. **You must include the CPD event code as your reference (i.e. 'CPD123456').**
- Failing to provide the CPD code will result in delays to your application where the CPD team are unable to match the payment to the application. Unfortunately, when we receive a payment via BACs with no CPD code, we are unable to link it back to the application and the payment may then be returned to the payee.

#### After application submission

- The CPD co-ordinator will do an initial review to check for completeness.
- The application is forwarded to a clinician in an appropriate specialty. The Reviewer will review according to the criteria listed in section 1 above.
- The event provider will receive an automated confirmation of approval email once the event goes live in our system.
- Whilst your application is awaiting a decision regarding approval you can use the following wording: **'Application for CPD Approval submitted to the Federation of the Royal Colleges of Physicians of the UK'**.

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## After obtaining approval

All organisers/providers of approved events are required to:

- Keep an attendance record of their meetings. These records should be kept by organisers for a minimum of five years and made available to the Federation of the Royal Colleges of Physicians on request. It is not necessary to send these to the Federation unless they are requested. If requested, organisers should supply attendance records within one month of the initial request for these.
- Provide [attendance certificates](#) to all participants as evidence of their CPD activities. On certificates of attendance please state [Event name] has been approved by the Federation of the Royal College of Physicians of the United Kingdom for [number of credits] category 1 (external) CPD credit(s).
- Provide [evaluation forms](#) to the delegates requesting them to record their rating of the relevance, quality and effectiveness of the event. It is not necessary to send these to the Federation unless you are requested to do so.

## Appeals

If an event is not approved by the Federation reviewer, the applicant may appeal. An appeal must be made in writing within 2 weeks. The application will then be reviewed by a CPD Director. This will be the Associate Medical Director for CPD or one of the College CPD Directors. They may consult an appropriate experienced consultant in the relevant specialty if necessary. A decision will be reached within 3 weeks of the appeal being received. The decision of the CPD Director will be final.

## Refunds

The fee is to cover the expense of providing the CPD approval process. If the event is postponed, we will approve the event on the new date without additional charge as long as there are no major changes to the programme. If the event is not postponed but is cancelled, we will not refund the fee paid, but where the fee exceeds £100 (plus VAT), we will consider offering the provider a credit that allows their next application to be processed for a reduced fee.

## 4. Conditions of Approval

**The Federation may withhold or withdraw approval for CPD credits at any time for one or more of the following reasons:**

- If the event does not include high quality content covering the subject matter.
- Failure to meet the approval criteria listed in section 1 and 2 above.
- If the provider's evaluation record for previous or on-going events is not satisfactory especially where the concerns raised have not been addressed.
- Significant changes to educational content and/or changes to the presentation format following approval.
- Failure to disclose to us any conflict of interest on the part of the organiser, provider or speakers.
- The delegate list of educational meetings being used as a resource for prior or subsequent promotional contact by the sponsoring (or any other) commercial organisation.
- A perception by attendees of bias on the part of the speakers at the event.

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- Advertising presented during the educational part of the event.
- Advertising the event as being CPD approved before confirmation is received.
- Advertising CPD credits for promotional purposes (i.e. “Attend this meeting and obtain 14 credits”).
- Misrepresentation of the number of CPD credits approved.
- Misrepresentation of CPD approval on promotional or other material to imply endorsement or “Kitemarking” of the event by the Federation, over and above other events of similar educational value. A factual statement of the number of CPD points allocated is all that is permitted, and font size should be consistent with the rest of the promotional material.
- Misrepresentation of the name of the Federation or of its constituent Colleges. Use of the Federation or individual College logos by the provider as part of its own promotional material.

### **Potential additional steps for providers breaching Federation guidelines**

Where a provider organisation commits repeated significant breaches of the approval criteria or conditions of approval, they will be given a final warning that in future they must comply with the guidelines.

Where a provider organisation commits a serious breach of the approval criteria or conditions of approval, that is where there is or may be a significant reputational risk to the Federation or one of the Colleges of Physicians, they may be given a final warning that in future they must comply with the guidelines.

In the rare instance where a provider organisation commits one or more further significant or serious breaches of the criteria for approval or the conditions of approval, following a final warning, the provider may be informed that the Federation will no longer accept applications for CPD approval from the organisation concerned.

## **5. Live-streamed Events and Webinars (over 2 hours)**

We consider live-streamed events and live webinars that are over 2 hours for Federation approval via the live event approval system. Please refer to this supplementary document for key points to consider before applying. Applications for hybrid events lasting over 2 hours which provide both live and live-streamed options can also be submitted by this route.

### **Live Webinar Programmes (under 2 hours each)**

For live webinar of programmes you will need to complete the new Webinar application form where you can add multiple webinar sessions that are no more than 2 hours. Please see the fee document.

## **6. Sample Documents & Important Forms**

- [CPD Declaration of Interests form](#)
- [Sample Certificate of Attendance](#)
- [Sample Evaluation Form](#)
- [CPD Approval Guidance – Live-Streamed events and webinars](#)
- [Approval of Archived versions lectures and webinars](#)
- [CPD Approval Guidance - Promotional activity and advertising during Federation approved CPD](#)

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## 7. Glossary

**International approval:** The Federation will consider applications for approval from established international medical education providers with a reputation for providing high quality CPD. Such providers may include universities, international specialist societies and some commercial education companies. The Federation will consider approving the following types of events:

- (a) Events with non-UK providers, but held within the UK or streamed from the UK, anticipating an audience from several countries,
- (b) Events with non-UK providers held outside the UK, but where the meeting has been recommended as a core meeting for one or more recognised physician specialties. These would include European specialty association meetings, North American specialist society meetings and worldwide specialist society meetings,
- (c) Events held outside the UK but where a significant number of UK physicians may be expected to attend because of the significance of the meeting.

**CPD:** Any learning outside of undergraduate education or postgraduate training that helps a medical professional maintain and improve their performance. It covers the development of knowledge, skills, attitudes and behaviours across all areas of professional practice. It includes both formal and informal learning activities.

**External** (Category 1) credits are given for learning activities outside the doctor's employing organisation, such as attending conferences and study days. These activities may be regional, national or international. External (Category 1) credits may also be given for engagement with approved distance learning materials.

**Internal** (Category 2) credits are given for activities within the doctor's employing organisation, provided solely for local clinicians. e.g., hospital Grand Rounds, journal clubs, clinico-pathological conferences, local evening medical meetings, etc. However, where a non-clinical course is provided by one or more external educational provider(s) in a single health organisation the Federation will consider allowing external non-clinical credits.

**Personal** (Category 3) credits relate to individual study such as private reading, preparing lectures, research etc. Engagement with distance learning materials that have not been approved should be recorded as personal (category 3) credits.

**Clinical** credits concern any educational activity in which the educational content directly relates to clinical topics/patient care.

**Non-clinical** credits concern educational activities that are not directly related to clinical issues, e.g., on management, ethical and legal issues, appraisal training.

## 8. Contact the CPD Team

[CPDapproval@thefederation.uk](mailto:CPDapproval@thefederation.uk) for any queries.

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