

CPD Approval Guidelines for Distance Learning: e-Libraries and e-Platforms

Introduction:

e-Platforms – these consist of a group of digital learning resources which may include e-learning modules, on-demand versions of lectures and/or text articles. There must be associated interactivity to reinforce learning. Where an e-learning platform takes the form of a course or courses which is/are supplemented by live or live-streamed learning such as a webinar (blended learning), we will consider such applications via this route. Usually e-platforms will consist of at least 5 hours of CPD (5 credits), however, we will consider applications with fewer hours, especially where there are plans to expand upon the content at a later date (a minimum of 2 CPD credits must be provided).

e-Libraries – These are on-line information and learning services that provide access to current information about medical topics. The Federation gives higher priority to products that provide a record of the user's activity and/or include elements of active learning.

Providers

Eligible providers should be established providers of medical education, these could include:

- Universities or their departments
- NHS Hospitals
- Recognised UK specialist societies
- UK National medical bodies and associations
- Established international medical education providers

As it is not possible to review all the materials contained in e-libraries and e-platforms. Providers must have a track record of excellence in medical education. For these distance learning formats, the Federation will not accept applications from pharmaceutical or device companies or foundations linked to these companies.

The application should be supported by a senior physician/clinician who can authenticate and validate the product. The individual concerned must be registered with his/her national regulatory body.

Educational content

For these e-learning formats, the Federation acknowledges the need for regular updates to keep the information current. Providers may do this without submitting a new application, but the material must stay within the original scope of the approved product. Providers must inform the Federation of any significant change in sponsorship and must guarantee that any changes will not be influenced by pharmaceutical or device companies. They must also guarantee that there will continue to be no advertising within their product.

Artificial Intelligence (AI)

1. Disclosure

Authors or others who are creating CPD content must disclose and describe the use of AI technologies in any content which is submitted to the Federation for approval and in any key sources that are used to develop that content, to the best of the authors' knowledge.

2. Authorship

AI technologies will not be accepted as an author of any content submitted for CPD approval. The Federation only recognises humans as being capable of authorship since they must be accountable for the work.

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 or author for its accuracy and balance.

Approval Criteria

All products eligible for approval should fulfil the following criteria:

1. Target audience

The target audience must be identified and fall within the remit of the Federation. We approve products primarily targeted towards Consultant and SAS grade Physicians. Provided the product is appropriate for consultants and SAS grade physicians, the Federation will also approve educational material that is appropriate for trainees. Please [refer to our website](#) for Federation supported specialties.

2. Provide an educational needs assessment

Providers should provide a statement about educational needs. This might include a survey to identify needs, evidence of a lack of appropriate educational material relating to a particular topic/group of topics or evidence of a need for more e-learning for physicians.

3. Provide learning objectives which are appropriate for the target audience

For large products such as these we understand that the objectives are likely to be broad and generic but please summarise the objectives for your product.

4. Provide high quality content

The content must represent current evidence-based best practice and must be able to deliver the stated learning objectives.

5. Provide evidence that key authors or editors have appropriate specialist skills and knowledge

A statement relating to key editors and authors should be provided. This should detail how authors are selected. We do not expect a complete list of authors with their qualifications. The information provided might be the organisation's policy relating to editors and/or authors, with a statement to the effect that the organisation audits compliance with the policy and that there has been a high level of compliance with the policy. For e-platforms please provide a brief biographical statement (a few lines) for the lead author of each module or section. Where e-learning modalities are supplemented by live or live-streamed learning (e-platform applications) please provide brief biographical details for the speakers or facilitators as required for live events.

6. Include active learning methods (e-platforms)

For e-platforms, there should be clear evidence of active learning techniques such as questions during or after the modules/lectures/articles and encouragement to reflect on practice.

7. There should be evidence that all legal, medico-legal and ethical considerations are met

These include copyright, patient consent for clinical materials used, patient confidentiality and data protection.

8. Any support, sponsorship or involvement of a commercial organisation such as a pharmaceutical or device company must be declared in the product and must not influence the structure or content of the e-learning

Any sponsorship must be in the form of an unrestricted educational grant and must also be declared on the application form. There must be no advertising in the e-learning material and commercial logos are not permitted.

The product will not be approved if there is bias towards use of any commercial product that does not represent current evidence-based practice. Generic names of pharmaceutical products must be used throughout rather than proprietary names unless this is a regulatory prescribing requirement to use the proprietary name.

9. Any competing interest on the part of the provider must be declared.

A senior person from the provider organisation, usually a senior clinician, should complete a Declaration of Interest Form on behalf of themselves and the provider organisation.

10. Learner engagement and evaluation

Providers should describe how learner engagement will be monitored or assessed. A method of monitoring educational activity is mandatory for the approval of e-libraries. There should be a mechanism for learners to provide feedback to the providers.

11. The provider's evaluation record for their other products must be satisfactory or, where not, reasons for unsatisfactory ratings must have been addressed

12. e-platform applications with a live or live-streamed component

When an application includes one or more live or live-streamed component linked to the e-learning components, the provider should attach a copy of the programme for the live or live-streamed component(s), including the names of speakers or facilitators. Alternatively, the provider may wish to supply a list of the faculty from which the speakers or facilitators will be drawn. Brief biographical details should be supplied for each member of the faculty, in line with the Federation guidance provided for live event approval. The provider should also provide a statement relating to whether there is any additional sponsorship for the live or live-streamed component (over and above any sponsorship for the e-learning component) and should submit a signed Programme Director's Declaration for the live/live streamed component (mandatory from January 2022).

Diversity and inclusion

- 1. Educational faculty (authors).** The Federation requires providers to promote diversity and inclusion when selecting the faculty for their educational material. 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 educational material.

Credits

1 credit will be awarded for each hour of educational activity completed by the physician. For e-platforms please list the expected number of credits associated with the submitted modules. For e-libraries please do not enter a figure.

Submission process:

Currently the application process is not fully automated. Please complete the application form in detail and return it to CPDApproval@thefederation.uk with all the recommended attachments. Payment for the approval process should be submitted at this time. The approval process cannot commence until payment is received. We aim to complete our process within 10 weeks from submission.

Federation review policy for e-libraries and e-platforms

The e-learning product will be reviewed against the criteria listed above. Once approved these e-learning formats will be approved for a period of 2 years. If Federation approval is to continue beyond 2 years, a full review will be required. In addition to this, an interim review will be carried out by reviewers on behalf of the Federation after 1 year of each 2-year approval period. The Federation collects simple evaluation data on all approved CPD activities directly through the CPD Diary, this will be monitored for e-libraries and e-platforms.

Review of e-platforms

A minimum of 10% of the modules will be assessed by our specialist reviewers before a recommendation for approval can be made. Depending on the number and duration of the modules, the review methodology may involve a sampling approach.

For a platform covering one or two specialties, the product will be assessed by a minimum of 2 reviewers. Where a platform covers more than 2 specialties, the product will be assessed by at least 3 reviewers. A final decision regarding approval will be made by the Associate Medical director for CPD or one of the College CPD Directors.

Review of e-libraries

Evaluation will involve a sampling approach. If the e-library covers one or two specialties, the material will be sampled by a minimum of 2 reviewers. If the e-library covers more than 2 specialties, the material will be sampled by at least 3 reviewers. Each reviewer will be asked to sample several sections within their sphere of expertise.

A final decision regarding approval will be made by the Associate Medical Director for CPD or one of the College CPD Directors.

Applications that are not approved by the Federation

Where an application is not approved, the provider will have one opportunity to address the reviewers' concerns and submit a revised application. If the revised application does not fully address the reviewers' concerns, a new application may be submitted later, but this will be treated as a new application, requiring payment of an additional fee.

Appeals

If an application is not approved by the Federation, the applicant may appeal. An appeal must be made in writing within 2 weeks. The application will 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 appropriate experienced specialists in relevant specialties if necessary. A decision will normally be reached within 4 weeks of the appeal being received. The decision of the CPD Director will be final.

Fees for e-Libraries and e-Platforms

Please refer to the [Fee document](#) for all CPD event applications.

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 therefore we sometimes have to arrange for the payment to be returned to the payee.

Terms and Conditions of CPD Approval by the Federation

Upon written confirmation of approval, the provider will be asked to agree to the following:

- When indicating Federation CPD approval within the product and in any communications or promotional material, the following statement (or similar wording) must be used:
“This product has been approved for Distance-Learning CPD Credits by the Federation of the Royal Colleges of Physicians of the UK. The expiry date for CPD approval is *month / year.*”
- The use of a logo for the Federation of the Royal Colleges of Physicians or of any Royal College logo is not permitted.
- The product will automatically be removed from the electronic events database at the end of the approval period unless an application for reapproval has been received.
- A CPD activity code or codes will be issued to the provider upon approval. The activity code will be valid until the agreed expiry date
- A report summarising the results of evaluation of the product must be provided to the CPD office upon request.
- The Federation of the Royal Colleges of Physicians reserves the right to withdraw CPD approval at any time, should it feel that any of the above terms and conditions has been contravened, in which case the provider must no longer communicate that their distance-learning product has been approved for CPD by the Federation.

CPD Approval: e-Platform and e-Library Application Form

Once complete, please email CPDApproval@thefederation.uk with this form and all applicable supporting information listed in Step 11.

Step 1. Title of e-library or e-platform:

Code (to be generated by the CPD Team)	Start Date	Title of E-library or E-platform	Approximate Total Hours of Learning Content (for e-platform only)

Step 2. Basic Details

User Fee (£)	
Type (Clinical or Non-Clinical)	
Contact Name	
Contact Job Title	
Contact Email	
Contact Tel	

Step 6. Educational Needs Assessment

Please provide a statement below about educational needs. This might include a survey to identify needs, evidence of a lack of appropriate educational material relating to a particular topic/group of topics or evidence of a need for more e-learning for physicians:

Step 7. Active Learning (E-Platforms Only)

For e-platforms only: Please provide a summary of the way in which active learning is provided (for example are there questions for the user throughout the product or at the end of each section or module?)

Step 8. Legal, Medico-Legal and Ethical Considerations

Please confirm below that all legal, medico-legal and ethical considerations have been met. These include copyright, patient consent for clinical materials used, patient confidentiality and data protection.

Step 9. Sponsor Details

Do you have any sponsors? Yes No

If yes, please provide details below.

Step 10. Learner Engagement

Providers should describe how learner engagement will be monitored or assessed. A method of monitoring educational activity is required for the approval of e-libraries.

How will this product be evaluated by users?

Step 11. Supporting Information

Please email the following documents (where applicable) to CPDApproval@thefederation.uk in support of your application:

- Evidence that key authors or editors have appropriate specialist skills and knowledge
- Statement about how authors are selected for their content
- Sample certificate of completion (you may wish to refer to our [sample attendance certificate](#) as a template.)
- Completed Declaration of Interests Form (e-learning)

Declaration of Interests Form (e-learning)

Date:

Name:

Professional details:

Main occupation:

Name of the employer(s):

Please declare any interests here:

Commercial

The existence of any significant financial activity or other relationship the senior clinician/provider organisation has with:

(a) manufacturer(s) of any commercial product and/or providers of commercial services discussed in educational material

(b) any commercial supporters of the activity

This will apply to any relationships that are in place at the time the submission or in the 36 months preceding the submission

Research & Publishing

Financial compensation received by the senior clinician for publishing publications from a healthcare company, organisation or marketing company

Educational Activities

Financial compensation received by the senior clinician in relation to training of health professionals or planning training packages

Ownerships and possessions in health care companies

e.g. Relevant stocks and shares owned by the senior clinician (e.g. pharmaceutical or medical device companies)

Expert functions in health care and health guidance processes

Other roles held by the senior clinician e.g. Board member in a development project, member of health board in the municipality

Signature:

PROGRAMME DIRECTOR'S DECLARATION (e-learning)

Name of educational product:

Provider organisation:

1. I declare that:

- The educational material was developed under my supervision, and I have overall responsibility for it. It represents a balanced perspective of the subject matter.
- This educational material complies with all relevant ethical, medico-legal, regulatory and legal requirements applicable in the country where it is being held.
- The event fulfils the Federation's Diversity and Inclusion criteria
- I am aware of the source and form of any commercial funding received to support the educational material
- Lead authors/editors will disclose any potential or actual conflict of interest.
- All members of the committee overseeing the educational material have declared their conflicts of interest.

Signature:

Date:

2. If financial support has been provided from a commercial organisation other than the organisation submitting this application, please confirm whether any of the sponsoring organisations have influenced the structure or content of the programme.

Yes/No/Not applicable

(Please select)

Signature:

Date:

NB Both of the above sections of the form need to be signed even if 'Not applicable' has been selected

Full name (block capitals):

GMC Number (or other appropriate registration details):

Address:

Email:

Telephone: