

WNA CEAP - Examples of Communicating Disclosures to Learners

Note A: Providers of for-credit education must convey specific information to learners before content is delivered. This includes:

- Presence or absence of relevant financial relationships for everyone in a position to control activity content (planners, presenters, enduring material content developers, content reviewers not on the planning committee, other faculty)
- Approval statement of educational provider awarding contact hours (including name of provider)
- Criteria for awarding contact hours (successful completion requirements)
- If applicable, a joint-provider statement
- If applicable, commercial support information (names of commercial supporters – NO LOGOS; nature of support if in-kind)
- For Enduring Materials (ONLY), the completion date after which contact hours will no longer be offered for the activity (“Expiration Date”)

Note B: If any of the following conditions apply to your educational activity, you do not need to identify, mitigate, or disclose relevant financial relationships for the activity:

- It will only address a non-clinical topic (e.g., leadership, precepting or communication skills training).
- It is for a learner group that is in control of the content entirely (e.g., spontaneous case discussion conversation among peers).*
- It is a self-directed educational activity where the learner will control their educational goals and report on changes that resulted.*

* Contact WNA for further guidance if you think this describes your future educational activity.

You still need to disclose the other items listed in Note A above!

Presence or absence of relevant financial relationships for everyone in a position to control activity content (planners, presenters, enduring material content developers, content reviewers not on the planning committee, other reviewers of content, other faculty) –

What to disclose before the activity content is delivered:

If there are NO relevant financial relationships:

Inform learners that no one in control of content (either individually or as a group) has any relevant financial relationships with ineligible companies.

Remember that you do not need to make disclosures of relevant financial relationships for the three exceptions noted above.

If there ARE relevant financial relationships:

Disclose name(s) of the individuals, name of the ineligible company(ies) with which they have a relevant financial relationship(s), the nature of the relationship(s), and a statement that all relevant financial relationships have been mitigated.

Examples:

| If there are NO relevant financial relationships: | If there ARE relevant financial relationships: |
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| No planners or faculty have any financial relationships (with companies whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients) that are relevant to the content of this educational activity. | No planners, presenters or other faculty have relevant financial relationships with ineligible companies except as follows: <ul style="list-style-type: none"> • Yvonne Gehu is on the speakers' bureau for XYZ Medical Device Company. • Marla Genoa is a consultant for Gemini Marketing Firm. These relevant financial relationships have been mitigated. |
| Cassandra Jones, BSN, Mark Boyd, MSN, and Xin Lee, FNP (planners/presenter for this activity) have no relevant financial relationships with ineligible companies. | Activity planner Nicholas Garcia, RN, PhD is a consultant for EFG Pharmacy Benefit Management. This relevant financial relationship has been mitigated. There are no other relevant financial relationships for anyone in a position to control content. |
| No one in control of content has any relevant financial relationships with ineligible companies.* *Ineligible companies are those whose primary business is producing, marketing, selling, reselling, or distributing healthcare products used by or on patients. | The content developers and presenters of this online activity have no relevant financial relationships with ineligible companies except for Trudy Miller – stockholder in ABC Pharmaceuticals. This relevant financial relationship has been mitigated. |

Note C:

- Disclosure to learners must not include ineligible companies' corporate or product logos, trade names, or product group messages.
- Remember all other disclosures listed in Note A above must be made as indicated.
- It is helpful to include definitions of terms for learners to support the understanding of your processes to protect the learning environment from industry business influence.