

COPE offers this document as a template for COPE CE Administrators/Providers to use to receive disclosure forms prior to confirming participation. This form can be used to submit courses for COPE Approval, and as disclosure information that must be disclosed to the learners. With modification it can be used for lecturers, authors and members of planning committees. NOTE: COPE CE Administrators/Providers are not required or expected to use this document; it only serves as an example.

Re: Relevant Financial Relationships with Commercial Interests

Dear [INSERT NAME]:

We are pleased that you are willing and able to participate in our COPE Accredited CE activity scheduled for [DATE] at the [LOCATION] in [CITY].

[COPE CE ADMINISTRATOR/PROVIDER NAME] is an approved COPE CE Administrator/Provider. As such, we have made the choice to meet the COPE expectations for our practice of continuing education. Our approval is important to us. We look forward to working together to provide COPE Accredited CE of the highest standard.

The activity we have asked you to participate in is based on [INSERT IDENTIFIED NEED]. We have planned the activity so that [INSERT EXPECTED RESULT]. The purpose or objective or your contribution is [INSERT PURPOSE OR OBJECTIVE].

[COPE CE ADMINISTRATOR/PROVIDER NAME] has implemented a process where everyone who is in a position to control the content of an educational activity has disclosed to us all relevant financial relationships with any commercial interest. In addition, should it be determined that a conflict of interest exists as a result of a financial relationship you may have, this will need to be resolved prior to the activity. In order to do this, please complete the enclosed disclosure statement and return it to us by [INSERT DATE]. This information is necessary in order for us to be able to move to the next steps in planning this COPE Accredited CE activity. If you refuse to disclose relevant financial relationships, you will be disqualified from being a part of the planning and implementation of this COPE Accredited CE activity.

Again, thank you for agreeing to work with us on this COPE Accredited CE activity. We look forward to this activity making an important contribution to the continuing professional development of our learners and to your professional practice.

Sincerely,

Enclosure: Disclosure Form