



CONTINUING EDUCATION PROGRAM

STANDARDS, CRITERIA, AND PROCEDURES FOR APPROVAL OF CONTINUING EDUCATION ACTIVITIES FOR CANADIAN PSYCHOLOGISTS

2018 REVISION

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I. INTRODUCTION

BACKGROUND

In 1983, the [Board of Directors](#) of the Canadian Psychological Association (CPA) established a system to approve sponsors of ongoing Continuing Education (CE) programs. In 1986, this system was reaffirmed and an additional system for the approval of individual continuing education activities was established. The standards, criteria, and procedures of this manual were approved by the Board in 1983, and revised in 1986, 1990, 2000, 2005, and 2010, with an update (for clarification purposes) in 2012. This document is the 7th revision and was completed in 2018.

It is the responsibility of the [Education and Training Committee](#) of the Board to review the document and revise when and where necessary. The CPA acknowledges the work of the American Psychological Association and the Canadian Guidance and Counselling Association in pioneering the content, structure, and procedures for continuing education. Their efforts have influenced the content and wording of this document.

This 2018 revision owes much to the earlier versions. This revision has been extended to include those CE activities that may: a) include conferences; b) have a primarily interprofessional or interdisciplinary focus; and c) be provided via correspondence or in a non-face-to-face format, such as via teleconference using audio-visual, electronic, or internet-based technology.

The CPA's system of CE approval aims to assist Sponsors and Providers of formal continuing education programs and activities by setting rigorous community standards for CE that Sponsors and Providers can meet and for which they can gain recognition. Sponsors and Providers include universities, clinics, professional associations, specialty societies, consulting firms, and individual psychologists. The CPA employs this system to assure users that the CE programs and activities of CE Sponsors and Providers are adequately planned and administered to meet CPA's standards, criteria, and procedures.

DEFINITIONS

Several key terms will be used throughout this document. The following definitions are intended to ensure that these standards, criteria, and procedures are understood and used correctly:

Continuing Education (CE): A broad term encompassing all educational activities beyond formal higher education, including continuing professional development (CPD). Given its broader focus than CPD, CE is the preferred term in this document.

Sponsor (Category A): An individual, group, or organization that is approved to provide credit for several structured CE opportunities over the course of a calendar year.

Provider (Category B): An individual, group, or organization that is approved to provide credit for a single structured CE opportunity.

CE Activity: A single CE opportunity that may or may not be part of a larger CE program. Examples include an individual workshop, webinar, course, or conference.

CE Program: Typically offered by CE Sponsors, a CE program encompasses multiple CE activities.

Psychologist: A psychologist is an individual with graduate training in psychology who studies how we think, feel, and behave from a scientific viewpoint and applies this knowledge to help people understand, explain, and change their behaviour.

Note: “Psychologist” is a protected title in the provinces and territories of Canada, accorded to those who meet the standards and criteria set by provincial and territorial bodies that regulate the provision of psychological services. Thus, a “psychologist” is someone who is licensed or registered to practice psychology. This document, however, employs a broader definition of “psychologist” to reflect the fact that CE activities are designed, instructed, and attended by practitioners and non-practitioners of psychology alike.

II. CONTINUING EDUCATION & PSYCHOLOGISTS

BACKGROUND

With the rapid growth of knowledge in psychology, it is essential for psychologists to continue their education and professional development beyond the graduate level to keep abreast of new knowledge, research methods, and practice techniques. In addition, over recent years, regulatory bodies of psychology in Canada have begun mandating that their members acquire specific kinds and amounts of CE over designated lengths of time. It is also essential to develop additional competencies and awareness of limitations when, by choice or circumstances, psychologists change the focus of their work.

Formal degree training provides the knowledge and skills as well as the foundation on which to build a continuing career in psychology. CE is intended to provide psychologists with up-to-date information, research, and skills in their area of focus, but does not replace formal degree, internship, or post-doctoral training. CE in psychology is an ongoing process consisting of learning activities that:

1. Are relevant to psychological practice, education, and science;
2. Enable psychologists to keep pace with emerging issues and technologies; and
3. Allow psychologists to maintain, develop, and increase competencies to improve services to the public and enhance contributions to the profession.

The need for continuing education is reflected in the [*Canadian Code of Ethics for Psychologists*](#) (Canadian Psychological Association, 2017). Specifically, Principle II.9 states that psychologists:

“Keep themselves up to date with a broad range of relevant knowledge, research methods, techniques, and technologies, and their impact on individuals and groups (e.g., couples, families, organizations, communities, and peoples), through the reading of relevant literature, peer consultation, and continuing education activities, in order that their practice, teaching, supervision, and research activities will benefit and not harm others.”

TYPES OF CONTINUING EDUCATION

The various means by which psychologists may engage in continuing education generally fall under one of three categories:

- 1. Unstructured, self-directed learning, such as that acquired through independent study or home study.**

Many professions recognize the value of structured self-initiated learning projects, personal practice reviews, audits, incident reports, utilization studies, research, teaching, and clinical practice guideline development as some of the many options that can contribute to continuing education.

The CPA recognizes the importance of these activities in contributing to the continuing education and professional development of psychologists. However, as these activities are unstructured and not offered by a Provider or Sponsor of continuing education, the CPA can neither regulate nor provide continuing education credit for such activities. As a result, **this document does not apply to such activities.**

- 2. Structured, other-directed, evidence-based learning offered by a Provider or Sponsor of continuing education, including attendance at conferences, workshops, courses, and seminars.**

Traditionally the most common form of continuing education, these activities typically require in-person attendance. However, the increasing availability of real-time, remote attendance has expanded their accessibility in recent years. Among the major benefits of such activities is the potential for a high-degree of interactivity with both the individuals guiding the learning activities and those in attendance. This allows

attendees to receive immediate feedback and often results in a learning experience tailored to the needs of a specific audience.

3. Structured, self-directed, evidence-based learning offered by a Provider or Sponsor of continuing education, such as that acquired through distance education, web-based instruction, and blended education.

These activities generally allow participants to engage in learning at a place and time of their choosing. Participants can manage their own learning, but do not necessarily have direct face-to-face contact with instructors. In addition to traditional texts, these activities often include use of such teaching and learning techniques as audio-visual materials, teleconferencing, electronically or computer mediated communication, and interactive online learning.

The CPA's Continuing Education Approval System applies only to the subset of CE activities that are structured and organized by a Provider or Sponsor (**2 and 3 above**). This document outlines the standards, criteria, and procedures of the CPA Continuing Education Approval System. Standards are listed, followed by specific criteria. Providers and Sponsors seeking CE approval from the CPA must meet these standards and criteria.

This document is divided into sections that follow the application process from start to finish. Notes are provided throughout to help clarify key points, highlight important information, and describe any exceptions or considerations relevant to the section under discussion. Please ensure that you understand and follow all sections of this document when preparing your application. Failure to do so may result in missing information and significant delays in processing your application.

BENEFITS OF CPA CE APPROVAL

Approved CE Sponsors and Providers will receive the following benefits:

1. Sponsors and Providers who have received CPA CE approval have demonstrated their achievement in meeting a national standard of continuing education for psychologists.
2. Sponsors and Providers may list approval by the CPA on their CE materials, advertisements, and promotional materials.
3. Sponsors and Providers will be permitted to issue CE certificates to participants, citing their CE activity(ies) as approved by the CPA.
4. The CPA will document approved CE credits earned by CPA members and affiliates in a confidential data bank. This documentation will occur at the member's request as indicated by the submission of a completed CE Credits Authorization form.
5. CE activities hosted by Sponsors and Providers will be promoted through CPA social media (e.g., [CPA Events](#) Twitter account).

Approved CE Sponsors **only** will receive the following benefits:

1. Listed by the CPA in its publications and [on the CPA website](#) as CPA-approved Sponsors of CE activities.
2. Ability to hold multiple CE activities during the period of approval without needing to submit separate applications for each activity. This means that any activity offered unchanged by the Sponsor when CE approval was accorded has CPA CE approval during the period of approval (typically 1 year). Any activity that is changed or added following approval does not have CPA CE approval unless the CPA has been notified of and approved the change or addition.
3. Reduced per-activity fees when holding more than 1 activity per year.

III. APPLICATION, REVIEW, & RENEWAL

APPLICATION & REVIEW

To obtain CPA approval as a Sponsor or Provider of CE for psychologists, organizations must submit an application and the relevant fee (Section X below) to the Continuing Education Office of the Canadian Psychological Association. Applications are accepted by post, fax, or email. Payment is only accepted by cheque, Visa, or Mastercard.

Applicants for approval as CE Sponsors (Category A) complete the application form in [Appendix A](#). CE Providers applying for approval of individual CE activities (Category B) complete the form in [Appendix B](#).

Applications are reviewed on the basis of the standards and criteria specified in this document as they are received by the CPA's Coordinator, Education and Research ("Coordinator" hereafter), who is also responsible for granting approval. The Coordinator reports to the CPA's CEO and to the CPA's Education and Training Committee. Approval decisions are usually made within **4 weeks** of receipt of a complete application. Applicants are encouraged to submit their materials for review as far in advance of their planned activities as possible. This ensures that the Coordinator has sufficient time to review the initial application, request additional information (if needed), and review any additional information provided. This also ensures that, given approval is granted, promotional materials advertising the activity(ies) can convey the earned CPA CE approval status.

The granting of CPA approval to a Provider or Sponsor requires that the standards and criteria specified in this document are fully met and detailed in the application form. The CPA reserves the right to request additional information from an applicant to fully confirm that all criteria have been met. The CPA reserves the right for CPA staff to attend an applicant's CE event, at the expense of the prospective Provider or Sponsor, to confirm that all criteria have been met. Where the costs of doing so would be prohibitive to the prospective Provider or Sponsor, a local representative identified by the CPA's Education and Training Committee may attend on behalf of the CPA.

If a Sponsor or Provider's initial application does not meet the standards and criteria specified in this document, the Coordinator will indicate to the Sponsor or Provider which standards and/or criteria are not met. The Coordinator will also provide suggestions to the applicant for meeting these standards and criteria, including requests for additional documents. If the applicant is unable or unwilling to make the suggested changes or provide the requested documents, the Coordinator may decide to reject the Sponsor or Provider's application. The Coordinator may also deny an approved Sponsor's application to make changes to its approved CE programming ([Appendix D](#)) if the suggested changes do not meet the standards and criteria specified in this document and the Sponsor is unable or unwilling to make all changes necessary to meet these standards and criteria. Should an application be rejected, the Coordinator will communicate the reason and relevant standards and/or criteria underlying this decision to the Sponsor or Provider in writing.

Upon completion of review of the application for CE credit, the Coordinator communicates his or her approval decision to the applicant Provider or Sponsor in writing – by email or, at the request of the applicant, by surface mail.

APPROVAL & RENEWAL

Sponsors (Category A): CE Sponsor status applies for 1 year after receiving CPA approval. Status is then renewed **at the beginning of each calendar year** upon receipt of the annual fee and a complete annual report that demonstrates continued adherence to these standards and criteria. If the report or fee is not successfully filed and received at the beginning of the calendar year, Sponsor status will be lost and re-application for approval as a CE Sponsor, along with the relevant fee (Section X below), will be necessary.

An annual report ([Appendix C](#)) **must** be submitted at the beginning of each calendar year regardless of whether the Sponsor's initial approval covers a full calendar year. In cases where initial approval extends beyond the beginning of a new calendar year, renewal of CE Sponsor status will cover the remainder of the calendar year in which the Sponsor's first annual report is submitted. In such cases, Sponsors will be charged a prorated fee for the remainder of the calendar year when their first annual report is due.

When a Sponsor is granted approval, they can accord CPA CE credit to any activity that was on offer at the time of their application to the CPA. If the Sponsor changes or adds an activity, they must so inform the CPA using the form in [Appendix D](#). Upon receipt and review of that form, the CPA will notify the Sponsor whether CE credit can be extended to that new or changed activity.

The Coordinator is responsible for the review and approval of annual reports and renewal decisions, as well as for review and approval of changes or additions to a program reported by a Sponsor following the approval of an application or between annual reports.

Providers (Category B): The Coordinator is responsible for review and approval of Provider applications. When approval is granted to a Provider for a one-time CE activity, such approval applies to that activity only, and does not apply to other or subsequent CE activities that may be offered by the same individual, group, or organization. The approval period for a Provider offering a live CE activity (e.g., live webinar; in-person workshop) extends from the time approval is granted to the completion of the CE activity. For a Provider offering an on-demand CE activity (e.g., web-based course), the approval period extends for 1 year from the time approval is granted.

Note 1: The CPA's approval of an individual, group, or organization as a CE Sponsor or Provider is restricted to the activities described in the approved application or annual report form. The CPA's approval does not extend to any other CE activity the Sponsor or Provider might offer. In granting its approval, the CPA assumes no legal or financial obligations to Sponsors, Providers, or to those individuals who might participate in a Sponsor or Provider's CE activities or programs. Further, responsibility for the content, provision, and delivery of any CE activity approved by the CPA remains that of the CE Sponsor or Provider. The CPA disclaims all legal liability associated with the content, provision, and delivery of the approved CE activity.

Note 2: CPA CE approval is not to be confused with accreditation. Accreditation is reserved for doctoral and internship training programs in professional psychology (for more information on the CPA's accreditation activities, please visit: <http://cpa.ca/accreditation/>). CPA CE approval applies to the activities of Sponsors or Providers described herein. **When describing their activities in advertising or promotional materials, CE Sponsors and Providers cannot state that they have CPA "accreditation" for their activities, but instead must state that they have CPA approval to provide CE credit.**

IV. GENERAL STANDARDS & CRITERIA

This and the following sections are intended to be read as follows:

Sections IV, V, and VI: Standards, criteria, and procedures applicable to **both** CE Sponsors and CE Providers. All applicants for CPA CE approval (including CE Sponsors applying for renewal) must meet the general standards and criteria contained in these sections to be approved to provide CPA CE credit.

Sections VII, VIII, and IX: Standards, criteria, and procedures applicable to CE Sponsors **only**. All applicants for CPA-approved CE Sponsor status (including CE Sponsors applying for renewal) must meet the additional standards and criteria contained in these sections to be approved to provide CPA CE credit. Approval will be granted only if CE Sponsor applications meet these criteria as well as the general standards and criteria contained in Sections IV, V, and VI.

STANDARDS & CRITERIA APPLICABLE TO CE SPONSORS AND PROVIDERS

The applications of prospective CE Sponsors and Providers will be considered for approval only if they provide detailed information on:

1. CE program or activity content
2. Faculty and instructional personnel
3. Evaluations:
 - a. Participants' or others' evaluations of participant learning
 - b. Participant evaluations of CE activity

I. CONTENT

CPA-approved CE activities will promote the development of quality professional work in the areas of practice, university teaching, consultation, research, and other functions of psychology. CE activities are expected to build upon master's and/or doctoral education and to be relevant to the participants enrolled in the programs. CE activities offered to psychologists should clearly state their educational objectives and should be based on needs of psychologists that have been identified through relevant assessment procedures (e.g., survey of professionals' learning needs; demographic trends in populations served; written suggestions from prior activities).

Criteria:

1. One or more psychologists must provide direct input and be involved in all aspects of the program planning process for CE activities offered to psychologists for CPA CE credit. Direct input and involvement can be provided by psychologists through their representation on advisory boards, CE committees, or any body with the responsibility of developing the content and structure of a CE activity.

Note: Where the organization is owned or operated by one psychologist, it is recommended that this psychologist seek and provide evidence of regular consultation with other psychologists. Such consultation should focus on program planning and evaluation to avoid the possibility of conflict of interest, especially where resolution of participant complaints is involved.

2. The learning objectives of a CE activity must be stated explicitly. Learning objectives will articulate whether the CE activity focuses on the acquisition and demonstration of knowledge, the acquisition and demonstration of skills, and/or to inform opinion.

3. Content must be described explicitly, with a focus on how it relates to psychological theory, method(s), and/or practice.
4. Content must be appropriate to stated learning objectives.
5. Level of content and length of time of CE activity must be consistent with stated learning objectives.
6. Learning activities carried out by participants must conform to the highest ethical and professional standards of the [*Canadian Code of Ethics for Psychologists*](#) (CPA, 2017).
7. CE Sponsors and Providers must treat content and subject matter in as objective and unbiased a manner as possible as it relates to culture, nationality, ethnicity, colour, race, religious or nonreligious identity, sex, gender, marital status, sexual orientation, physical or mental abilities, age, socioeconomic status, linguistic background, or any other preference or personal characteristic, condition, or status.

II. FACULTY & INSTRUCTIONAL PERSONNEL

The quality and value of CE activities depend in large part on the instructor's expertise, competence in subject matter, and ability to facilitate learning to meet stated objectives.

Criteria:

Sponsors and Providers are required to submit CVs for all instructional personnel with their applications. Applications for CE activities that involve a planning committee or other organizing group (e.g., conference; workshop series) must also include CVs for members of the planning committee or organizing group.

Sponsors and Providers are also expected to determine whether instructional personnel have any conflict(s) of interest (e.g., private funding that may bias their presentation). The presence or absence of any such conflicts must be declared at the time of application as well as by the instructional personnel when they deliver their CE activity.

At a minimum, instructors must demonstrate that they:

1. Hold a master's and/or doctoral degree in psychology from an accredited institution (see Notes 1 and 2 below for exceptions);
2. Have specialized knowledge of, and expertise in, the area in which they are providing CE instruction; and
3. Have ability and experience in teaching, which includes setting educational objectives and assessing learning outcomes.

An instructor's degree will be verified through their CV. If necessary, the Coordinator may request a copy of an instructor's highest degree and/or licensure certificate. The instructor's teaching ability will be verified through their CV, evaluation forms available from previous teaching activities, and/or references.

Note 1: Provided the Sponsor/Provider has met the provisions of IV.I.1 and the instructor has demonstrated specialized knowledge and expertise in the area in which they are providing CE instruction, the instructor may be deemed to meet the provisions of IV.II.1 if they do not have a graduate degree in psychology, but do have an advanced degree in an appropriate discipline from an accredited institution.

Note 2: Provided the Sponsor/Provider has met the provisions of IV.I.1, the instructor may be deemed to meet the provisions of IV.II.1 if they have sufficient cultural knowledge and/or lived experience relevant to the CE activity whether or not the instructor has an advanced degree in psychology or an appropriate discipline. In such instances, the CE application will be referred by the Coordinator to an expert committee consisting of an Education and Training Committee member, a representative from the most relevant CPA Section, and a community representative selected by the relevant CPA Section.

III. EVALUATIONS

Sponsors and Providers are expected to develop and use evaluation methods that are appropriate to the subject matter, objectives, and delivery method of each learning experience. At a minimum, evaluation will include assessment of participant learning and participant satisfaction with the CE activity.

Sponsors and Providers must include information on evaluation plans with their application. Evaluation information should be used in designing/redesigning courses.

Criteria:

1. The evaluation procedure must assess degree of self-assessed and/or achieved (i.e., other-assessed) learning relative to the CE activity's specific educational objectives. Assessment of participant learning can be achieved in a variety of ways in accordance with program content and format. Examples include progress quizzes, post-tests, demonstrations, instructor-participant discussions, question and answer sessions, and appropriate questions in written evaluations of the CE activity (e.g., "How much did you learn as a result of participating in this activity?").

Note 1: Assessment of achieved (i.e., other-assessed) learning is required for CE activities that are not conducted in person. Achieved learning for such activities can be assessed with methods like those used for in-person CE activities, including progress quizzes, post-tests, online discussions, and real-time interactions with instructors and participants (video-, audio-, and/or text-based).

Note 2: Online courses must demonstrate that a specific criterion (e.g., scoring 75% on a post-test) was met or surpassed. Online courses that adopt an essay or other written assessment format must provide a detailed grading rubric.

2. The written evaluation procedure must assess participants' satisfaction with the CE activity. **At a minimum**, participant satisfaction evaluations must address the following questions:
 - a. Did the CE activity deliver what was promised by the CE Sponsor or Provider in its advertising and other promotional materials?
 - b. Was each learning objective of the CE activity met, in terms of outcome for participants?
 - c. Were teaching/learning methods used effectively (e.g., presentation format; activities; materials)?
 - d. Overall, how satisfied were participants with the CE activity?
 - e. Overall, how satisfied were participants with the instructor(s)?

V. AWARDING OF CE CREDIT

When a Sponsor or Provider awards CPA CE credit to participants of an approved activity, this credit must be based upon attendance, participation, and adequate demonstration of learning in an activity that meets these standards and criteria.

Criteria:

1. Sponsors and Providers will determine, in advance of offering the CE activity, the standards for successfully completing the activity and for awarding credits. CE credit (e.g., CE certificates) should be awarded only after the participant completes the full CE activity.
2. For an **in-person CE activity** where attendance is monitored throughout, 1 CE credit is defined as 1 hour of instruction and/or participation in a CE activity. Examples of participation include structured discussion sessions moderated by an expert, role plays, and other hands-on activities. One credit is awarded for each hour of the CE activity, not including breaks.
3. For a **non-face-to-face CE activity**, Sponsors and Providers must submit:
 - a. A description of the method (e.g., passwords or user ID) used to ensure that the person to whom CE credit is provided has actually done the work.
 - b. The method used to justify the number of CE credits to offer **and** a rationale for this method (e.g., field tests; other CE activities; prior experience).
 - c. The method by which participants can contact the instructor(s).
4. For **conference programs where multiple workshops are occurring simultaneously**, credits will be awarded on a session-by-session basis. Each workshop or session for which credit is awarded must meet the standards and criteria for CPA CE approval.

Note 1: For conferences, Sponsors and Providers must submit a description of the method used to ensure that individuals attended the workshops or presentations for which they enrolled (e.g., monitored sign-in sheet).

5. The CPA will not consider applications for activities that provide less than 1 CE credit. Approval for partial CE credits beyond this are granted in 15-minute intervals, with each 15-minute interval of instruction and/or participation in a CE activity equivalent to 0.25 CE credits.
6. **Participants must complete the full activity to receive CE credits.** Partial credits are not awarded to participants who do not complete the full activity.
7. It is the responsibility of the Sponsor or Provider to provide, monitor, and document CE credits. Sponsors and Providers must provide documentation of completion of CE activities to participants (including credits) and keep these on file for no less than two years.

Note 2: CE certificates are the responsibility of the Sponsor/Provider. The CPA will not provide certificates to participants for completing CE activities offered by approved CE Sponsors/Providers.

VI. PROMOTION & ADVERTISING

Promotional materials must be accurate and adhere to ethical principles as defined by the [*Canadian Code of Ethics for Psychologists*](#) (CPA, 2017). This applies to all aspects of the approved CE activity listed in advertising and promotional materials (e.g., content, credentials of presenters, objectives).

Criteria:

1. Participants must have access to the following information before registering:
 - Learning objectives
 - Participants for whom activity is designed
 - Skill level for which activity is appropriate
 - Schedule and format
 - Equipment required
 - Cost of activity
 - Refund/cancellation policy
 - Faculty credentials, including highest relevant degree and present affiliation, and
 - Number of CE credits.
2. A clear statement of the intended audience of the activity or program. Although the CPA's system of CE approval requires the CE activity to be directed to psychologists as defined herein, the Provider or Sponsor should further clarify whether the approved activity is intended for those with no, little, or substantive expertise in the content area and whether the activity is open to graduate students.
3. Mention of Sponsor/Provider relationship to the CPA in advertising and promotional materials (including on Sponsor/Provider websites) is limited to the following statement:

"**[Sponsor/Provider name]** is approved by the Canadian Psychological Association to offer continuing education for psychologists. **[Sponsor/Provider name]** maintains responsibility for the program."
4. The Sponsor/Provider must reproduce in full the statement found in Section III, Note 1 of these Standards, Criteria, and Procedures in a manner that is accessible to potential registrants (e.g., in advertising and promotional materials; on the Sponsor/Provider website). The Sponsor/Provider must indicate where this statement is or will be located when submitting an application or annual report.

Reminder: CPA CE approval is not to be confused with accreditation. Accreditation is reserved for doctoral and internship training programs in professional psychology (for more information on the CPA's accreditation activities, please visit: <http://cpa.ca/accreditation/>). CPA CE approval applies to the activities of Sponsors or Providers described herein. **When describing their activities in advertising or promotional materials, CE Sponsors and Providers cannot state that they have CPA "accreditation" for their activities, but instead must state that they have CPA approval to provide CE credit.**

VII. ADDITIONAL STANDARDS & CRITERIA FOR CE SPONSORS

ADMINISTRATION

All CPA-approved Sponsors of ongoing CE programs must have a clearly designated administrator, responsible for ensuring that programs and activities meet the criteria specified in this document.

Criteria:

1. The designated administrator must be qualified for the job as evidenced by training, background, and experience. Evidence of those qualifications must be submitted with the application, typically in the form of the administrator's CV.
2. The administrator must be knowledgeable regarding these Standards, Criteria, and Procedures. CE Sponsors must have procedures in place to ensure that the administrator maintains current and continuing awareness of adherence to these Standards, Criteria, and Procedures.
3. CE Sponsors must ensure continuity of their programs and activities if the administration changes. If the designated administrator changes, the CPA must be notified and provided with information on the new administrator's qualifications.
4. The administrator must submit an annual report **at the beginning of each calendar year**. The report details:
 - a) All CE activities from the previous calendar year
 - b) Problems encountered/managed
 - c) Evaluation summaries of all CE activities, including assessments of participant learning and participant satisfaction
 - d) Number of participants and number of CE credits for each activity
 - e) Number and schedule of activities to be offered in the following year
5. In addition to the annual report described in Section VII.4, the administrator must inform the Coordinator of any changes to the approved schedule of CE activities. Any changes or additions to the Sponsor's CE program must be approved by the Coordinator before that changed or added activity can claim CPA CE approval. Reports of any changes or additions must be made using the form in [Appendix D](#).

VIII. REVIEW OF ONGOING SPONSORS

Sponsors' programs and activities are reviewed annually and may also be reviewed at the CPA's discretion on the basis of information received from the Sponsor and/or another informed source or stakeholder.

The kinds of information that will prompt a review include:

1. The Sponsor's program no longer meets the standards and criteria detailed in this document.
2. The Sponsor's goals, activities, or administration have changed substantially.
3. Concern is raised by a participant or other informed stakeholder about the quality of the CE activities of the Sponsor.
4. CE activities are substantially different than those described in the Sponsor's application.

Given that Category B approvals are one-time events, there will be no ongoing review of Providers.

IX. APPEAL PROCEDURES

A Sponsor (Category A) who is denied CPA CE approval does have the right of appeal when:

1. Denied approval upon initial application.
2. Approval is changed or withdrawn in whole or in part upon the mandatory annual review.
3. Approval is changed or withdrawn in whole or in part upon a review initiated by the Coordinator as per Section VIII above.

Note 1: A Sponsor may choose not to seek approval for, or may not be approved for, all of the CE activities they provide. They may choose to apply for approval for only a subset of their activities if, for example, only some are directed to psychologists. It is possible that, upon application, a Sponsor may be approved to provide credit for only some of the activities for which they are seeking approval. It is also possible that approval of the Sponsor's activity will change upon review (IX.2 or IX.3 above).

A Provider (Category B) who is denied CPA CE approval upon application does not have the right of appeal. This is because their application for credit is for a one-time event. If approval is denied, there is insufficient time to conduct an appeal process that could potentially reverse the original decision, and approve credit, in time to be of use in advertising and hosting the one-time CE activity. The Provider (Category B) is free to re-apply for approval for a subsequent CE activity without prejudice.

If the Sponsor has the right of appeal (IX.1 to 3 above) and opts to file an appeal, they must do so **within 30 days of notification** of the Coordinator's decision and in writing to the Chair of the Education and Training Committee with a copy to the Chief Executive Officer of the CPA.

Note 2: Only the Sponsor may file an appeal. It is possible that, upon review of a Sponsor's status, the Coordinator makes a change to the approval of the Sponsor in that one or some of their CE activities are no longer approved. However, should that occur, it is still only the Sponsor who has the right of appeal, not the individual presenter or presenters of the activity or activities that were not approved. This is because the original approval was accorded to the Sponsor and not the individual presenter or presenters.

A Sponsor's appeal should include a statement of the reason(s) for appeal and should include supporting documentation. The CEO and Chair of the Education and Training Committee will receive and review the appeal to ensure the right of appeal is met (see above). If the right of appeal is met, the Chair will assign the appeal to three reviewers who will be members of the Education and Training Committee and/or subject matter experts designated by the Committee. The reviewers (i.e., the Appeal Panel) will review the information provided in the original application and its compliance with the Standards, Criteria, and Procedures in place at the time of the application. Information provided in the appeal materials will also be considered by the Panel, but only in so far as this information clarifies information in the original application. Any information in the appeal materials that conveys a change to a Sponsor's program since the original application will not be considered. Following this review, the Appeal Panel will either:

1. Uphold the decision of the Coordinator, or
2. Overrule the Coordinator's decision.

The decision of the Appeal Panel is final and will be communicated in writing by email (or surface mail at the Sponsor's request) to the Sponsor as well as to the Coordinator.

X. FEES

All fees can be paid by cheque, Visa, or Mastercard. All fees from Canadian Sponsors/Providers are subject to the relevant GST/HST. **All fees are non-refundable.**

Application fees are due at the time of application. **Annual fees** are due at the time of submitting the annual report.

Application and annual fees for Sponsors are determined on the basis of the total number of CE activities offered in a 12-month period. If a Sponsor offers the same workshop multiple times per year, each in-person or synchronous online offering of that workshop will count as one CE activity.

APPLICATION FEES

Category A: Application fee for Sponsors of **ongoing** CE programs (one-time fee)

1 to 5 annual activities:	\$350.00 +GST/HST
6 to 10 annual activities:	\$450.00 +GST/HST
11 to 20 annual activities:	\$550.00 +GST/HST
21 or more annual activities:	\$650.00 +GST/HST

Category B: Application fee for Providers of a **single** CE activity

\$250.00 +GST/HST

ANNUAL FEES (SPONSORS ONLY)

Category A: Annual fee for Sponsors of **ongoing** CE programs:

1 to 5 annual activities:	\$250.00 +GST/HST
6 to 10 annual activities:	\$300.00 +GST/HST
11 to 20 annual activities:	\$350.00 +GST/HST
21 or more annual activities:	\$400.00 +GST/HST

Note 1: Annual fees will be prorated for Sponsors whose initial 12-month approval period extends into a new calendar year.

Note 2: The addition of CE activities ([Appendix D](#)) to an approved Sponsor's CE program will result in a fee increase if the updated total number of CE activities exceeds the number of activities for which the Sponsor was approved.
