

CFPC Endorsement Process

(February 13, 2021)

Endorsement will be run through the Program and Practice Support (PPS) department, a lot like peer review process used by academic journals. The primary goals of this process are to ensure a robust reliable procedure that provides the Board with the confidence to obviate the need for Board to approve every request and to reduce the processing time to ≤6 weeks (with a 4-week goal).

The process outlined will be reviewed and undergo continuous quality improvement with a full evaluation after 2 years.

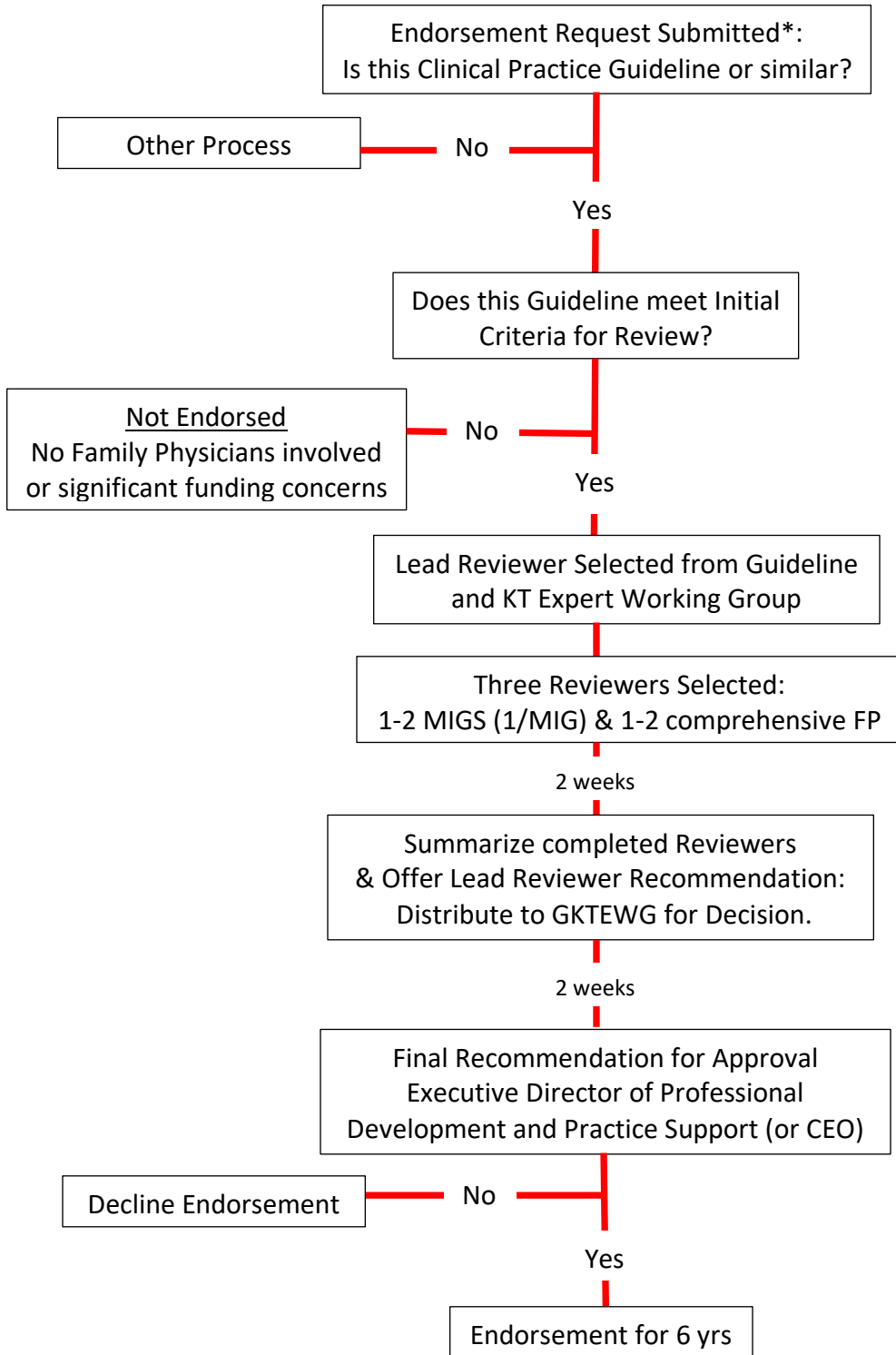
- 1) Endorsement request is submitted.
- 2) Intake by Practice Tools & Guidelines Coordinator. Have applicant complete the “CFPC Endorsement Criteria: Applicant form.” Pass on to the PPS Director.
- 3) PPS Director selects a Lead Review from the Guideline and Knowledge Translation Expert Working Group.
- 4) Lead review and PPS Director review key elements to determine suitability to proceed to full consideration/review.
 - a. Who funded the work
 - b. Family Physician involvement (committee, contributors, etc)
 - c. Other organizations endorsing the guideline
 - d. Alignment with the CFPC values including content in both official languages
 - e. Does not negatively impact Social Accountability / Social Justice
- 5) Lead Reviewer and PPS Director decide:
 - a. Decline: If considered inappropriate for endorsement, letter prepared to indicate endorsement declined and why.
 - b. Send for Full Review: If appropriate for review, Lead Reviewer will (with help of PPS director & Coordinator) reach out to 3 peer reviewers.¹ Peer Reviewers will be selected from a pool created by contacts of CFPC and expert working group, as well as 1 or 2 from related Member Interest Groups (MIGs).
- 6) Practice Tools & Guidelines Coordinator sends reviewers the guideline, the completed “CFPC Endorsement Criteria: Applicant Form” and a blank “CFPC Endorsement Criteria: Reviewers Form”. Review will be based on the criteria such as: funding, COI declaration, guideline committee make-up, evidence review process, and Primary Care relevancy lens. Relevancy lens includes application to primary care, consideration of opportunity costs, consideration comorbid conditions, provides content for decision-making (actual benefits and harms) and include shared-decision-making/patient tools.

- 7) Practice Tools & Guidelines Coordinator collects responses. Summarizes into table for Lead Reviewer. Lead Reviewer then comments on Summary, assures that specific key criteria are met, and provides a recommendation. The PPS Director will be available to support the Lead Reviewer in making recommendations for the Expert Working Group.
- 8) Summarized reviews and suggested recommendation distributed to Guideline and KT Expert Working Group. Members of Guideline and KT Expert Working Group approve recommendation or suggest alternative endorsement recommendation. Recommendations will stay focused, as much as possible, on approve or decline, with no or minimal suggestions to change.
- 9) Once quorum is reached, based on a 2/3 majority, the PPS Director finalizes recommendation and drafts letter for/against endorsement (with assistance of Coordinator and agreement with Lead Reviewer). Note, the PPS Director only votes on equivocal (ties), unresolved decisions.
- 10) Letter, summary, and guideline passed on to Professional Development and Practice Support (PDPS) Executive Director. Moves to final decision on endorsement with signature and then letter is sent. If complex and the reviewers or Guideline and KT Expert Working Group had considerable conflicting opinions, PDPS Executive Director will consult CEO.
- 11) The CEO may choose to make a decision or to consult the Board.
- 12) The Board will receive a briefing every six-twelve months on the guidelines reviewed with comment on the decisions for Board's review.
- 13) A maximum of one appeal will be permitted. It will initially be managed by the Expert Working Group and will be escalated to the CEO and Board as needed.

Referenced Concepts:

- 1) Peer Reviews: We shall build a large pool of peer reviews which we'll recruit by direct reach out. We'll access individual reviews no more than once a year. We'll certify the review process and offer CPD credits for review (as part of the critical look at the guideline and then feedback from the lead reviewer).
 - a. Members will be recruited through organizational connections, academic affiliations and personal networks of engaged leaders.

Proposed Guideline Endorsement Algorithm



* Submission includes completing Endorsement Criteria