



## All Financial Relationships Disclosure Form (Planners, Faculty, and Others)

Name of Individual:

Title of Continuing Education:

Date and location of Education:



Individual's prospective role(s) in education

Identify the prospective role(s) that this person may have in the planning and delivery of this education (choose all that apply)

☐ Planner

Examples: planning committee, staff involved in choosing topics, faculty, or content

☐ Teacher, Instructor, Faculty

☐ Author, Writer

☐ Reviewer

☐ Other

As a prospective planner or faculty member, we would like to ask for your help in protecting our learning environment from industry influence. Please complete the form below and return it to \_\_\_\_\_ at \_\_\_\_\_ by \_\_\_\_\_

The ACCME Standards for Integrity and Independence require that we disqualify individuals who refuse to provide this information from involvement in the planning and implementation of accredited continuing education. Thank you for your diligence and assistance. If you have questions, please contact us at [adminsupport@yourcesource.org](mailto:adminsupport@yourcesource.org)

### To be Completed by Planner, Faculty, or Others Who May Control Educational Content

Please disclose all financial relationships that you have had in the past 24 months with ineligible companies (see definition below). For each financial relationship, enter the name of the ineligible company and the nature of the financial relationship(s). There is no minimum financial threshold; we ask that you disclose all financial relationships, regardless of the amount, with ineligible companies. You should disclose all financial relationships regardless of the potential relevance of each relationship to the education. If you are an owner, employee or have stock in a *private* ineligible company, you are prohibited from participating in a CE activity.

#### Enter the Name of Ineligible Company

An ineligible company is any entity whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

For specific examples or for additional information regarding ineligible companies, visit [accme.org/standards](http://accme.org/standards).

#### Enter the Nature of Financial Relationship

Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.

#### Has the Relationship Ended?

If the financial relationship existed during the last 24 months, but has now ended, please check the box in this column. This will help the education staff determine if any mitigation steps need to be taken.

Example: ABC Company

Consultant

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☐ In the past 24 months, I have not had any financial relationships with any ineligible companies.

For Faculty and Content Reviewers to Complete:

If you reported relationships above, will the relationships impact your ability to present an unbiased presentation?    Yes    No

Please check the box if you agree with the statement.

- ☐ I agree to disclose any unlabeled/unapproved uses of drugs or products referenced in my presentation/materials.
- ☐ The content/presentation with which I am involved will promote improvements in healthcare and will not promote a specific proprietary business interest of an ineligible company.
- ☐ My content/presentation will be fair-balanced, evidence-based and unbiased. I have not and will not accept any honoraria, additional payments, or reimbursements specific to this activity from any ineligible company.
- ☐ If applicable, I understand that Your CE Source will review my content/presentation prior to the activity and I will make changes or provide content and resources as required.
- ☐ If I am providing recommendations involving clinical medicine, they will be based on evidence that is accepted within the profession of medicine as adequate justification for their indications and contraindications in the care of patients. All scientific research referred to, reported or used in support of justification of patient care recommendations will conform to the generally accepted standards of experimental design, data collection and analysis.
- ☐ If I am discussing specific healthcare products or services, I will use generic names to the extent possible. If I need to use trade names, I will use trade names from several companies when available, and not just trade names from any single company.
- ☐ If I have been trained or utilized by an ineligible company or its agent as a speaker (e.g., speakers’ bureau), the promotional aspects of that presentation will not be included in any way in this activity.
- ☐ If I am presenting research funded by an ineligible company, the information presented will be based on generally accepted scientific principles and methods, and will not promote the ineligible company.

I have carefully read, considered and agree to each item in this form, and have completed it to the best of my ability.

Signature of reporting individual

Date



Faculty, Author and Presenter Guidelines

Please keep the following guidelines in mind when preparing CE presentations:

1. Continuing medical education consists of educational activities which serve to maintain, develop, or increase the knowledge, competence, skills and professional performance and relationships that a healthcare professional uses to provide services for patients, the public or the profession. Planners, speakers, reviewers will not approve nor present any content that does not meet this standard.
2. Content cannot be included in accredited education if it advocates for unscientific approaches to diagnosis or therapy, or if the education promotes recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.
3. As much as possible, the content should present generic names of products. If trade names must be used, the names of multiple products should be used for balance from different companies.
4. Any unlabeled/unapproved uses of drugs or products discussed in the content must be disclosed to the audience in either the content or verbally at the time of presentation. Please include speaker disclosures in the presentation.
5. All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options.
6. Slides or handout materials should not contain any commercial advertising, graphics, logos, trade names, or product-group messages.
7. All published data, reference studies and articles cited in the content must be properly referenced on slides and handout materials.
8. All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.
9. If providing recommendations involving clinical medicine, all recommendations should be based on evidence that is accepted within the professions of medicine as adequate justification for their indications and contraindications in the care of patients.
10. Although accredited continuing education is an appropriate place to discuss, debate, and explore new and evolving topics, these areas need to be clearly identified as such within the program and individual presentations. It is the responsibility of accredited providers to facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately based on current science, evidence, and clinical reasoning.
11. Meaningful disclosure must be made to the attendees of this CE activity when products or procedures discussed are off-label, unlabeled, experimental, and/or investigational (not FDA approved) and any information or data that represent ongoing research, interim analyses, and/or unsupported opinion.
12. Payments or reimbursements will not be accepted from an ineligible company for any role in the delivery of this CE activity.

Content Standards

The following standards for CME content have been established by the ACCME, AMA and FDA:

1. Content should cover and teach to the learning objectives which should be displayed in the presentation.
2. Ensure that, if there is a range of evidence, that the credible sources cited present a balanced view of the evidence.
3. Clearly describe the level of evidence on which the presentation is based and provide enough information about data (study dates, design, etc.) to enable learners to assess research validity.
4. Use of generic names when referring to drugs is strongly encouraged. If trade names are used, those of several companies must be included.
5. Address any potential risks or adverse effects that could be caused with any clinical recommendations.
6. Any changes to disclosure information, presentations, content and/or inability to abide by the above standards and guidelines must be reported to Your CE Source immediately.