

Identification, Mitigation, and Disclosure of Financial Relationships and Copyright Permission



NO company logos (e.g.  ) of ineligible companies may be on any activity materials (slides, handouts, etc.)

To be completed by education staff.

Name of Individual: _____

☐ MD ☐ DO ☐ Other _____

Title of CME Activity: _____

Date and location of Education: _____

Individual's prospective role(s) in education.
(choose all that apply)

☐ Faculty, Teacher, Instructor

☐ Planner

☐ Author, Writer

☐ Reviewer

☐ Other _____

As a prospective faculty member or planner, we would like to ask for your help in protecting our learning environment from industry influence. Please complete the form and return it to _____ 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, contact the CME Office:

CMEOffice@carilionclinic.org

SECTION 1

☐ My lecture is non-clinical (e.g. leadership, communication, mindfulness, etc.) and will not involve any ineligible company whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products or services used by or on patients.

If you checked this box, please proceed to section 4.

SECTION 2

☐ In the past 24 months I **have had financial** relationships with ineligible companies. **(Complete SECTION 3 & 4)**

OR

☐ In the past 24 months I **have not had ANY** financial relationships with any ineligible companies. **(Complete SECTION 4)**

SECTION 3

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.

Enter the Name of Ineligible Company	Enter the Nature of Financial Relationship	Has the Relationship Ended?
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 of ineligible companies visit accme.org/standards .	Examples of financial relationships include employee, research, 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.	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	☒
		☐
		☐

If you have more financial relationships, please provide a separate sheet.

SECTION 4

COPYRIGHT PERMISSION & FINANCIAL RELATIONSHIPS

☐ Yes ☐ No : Did you use or plan to use Artificial Intelligence (AI) at any point in developing your presentation?

☐ I grant permission to reproduce and distribute my materials (slides & audio). If not my own material, I have secured the author's permission.

☐ I do not grant permission to reproduce and distribute my materials (slides & audio).

☐ I understand it is my responsibility to update my ineligible financial relationships as they occur throughout the year, between signed disclosure forms.

☐ I attest that the above information is correct as of this date of submission Signature

Date

Typed name may serve as your signature