

Financial Relationship Disclosure



Disclosure and Attestation Policy

To comply with ACPE's and ACCME's Standards for Commercial Support, everyone in a position to control content of an educational activity must disclose ALL financial relationships with ineligible companies (see Glossary of Terms on Page 2) over the past 24 months. 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. To see the ACPE FAQ for more information click [HERE](#).

Name: _____

CE Activity Title: _____ Presentation Date: _____

Role in CE Activity:

Planner Faculty/Speaker/Instructor Author/Writer Reviewer Other: _____

First, list all the names of proprietary entities/ineligible companies producing, marketing, selling, re-selling, or distributing health care goods or services consumed by or used on patients with which you have, or have had, a relevant financial relationship within the past 24 months. There is no minimum financial threshold; you must disclose all financial relationships, regardless of the amount, with ineligible companies. We ask you to disclose regardless of whether you view the financial relationships as relevant to the education. (Note: Non-profit or government organizations and non-health care related companies are exempted from this policy.)

Second, describe what you received (e.g., salary, honorarium). PSW does NOT require that you disclose a specific dollar amount.

Complete the table below to disclose commercial interests. If you do not have any interests to disclose, you may leave the table blank, and check the box beside the appropriate statement.

Commercial Interest	Nature of Relevant Financial Relationship (include all those that apply)	
	What I received	My role
<i>Example: Company X</i>	<i>Honorarium</i>	<i>Speaker</i>

I have not had any relevant financial relationships with any proprietary entities/ineligible companies within the last 24 months.

What was received: Salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit.

My Role(s): Employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities

In signing or typing your name below, you agree that the above information is true and accurate to the best of your knowledge, as of the date of this submission.

Signature _____
Date

Why do we collect this information?

Since healthcare professionals serve as the trusted authorities when advising patients, they must protect their learning environment from industry influence to ensure they remain true to their ethical commitments. Many healthcare professionals have financial relationships with ineligible companies. By identifying and mitigating relevant financial relationships, we work together to create a protected space to learn, teach, and engage in scientific discourse free from influence from organizations that may have an incentive to insert commercial bias into education.

Glossary of Terms:*

Commercial Interest: The ACPE defines a “commercial interest” as any entity producing, marketing, reselling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical services directly to patients are not “commercial interests”.

Financial relationships: Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected. ACPE considers relationships of the person involved in the CPE activity to include financial relationships of a spouse or partner.

Relevant financial relationships: ACPE focuses on financial relationships with commercial interests in the 24-month period preceding the time that the individual is being asked to assume a role controlling content of the CPE activity. ACPE has not set a minimal dollar amount for relationships to be significant. Inherent in any amount is the incentive to maintain or increase the value of the relationship. The ACPE defines ““relevant“ financial relationships” as financial relationships in any amount occurring within the past 24 months that create a conflict of interest.

Conflict of Interest Circumstances: create a conflict of interest when an individual has an opportunity to affect CPE content about products or services of a commercial interest with which he/she has a financial relationship.

Ineligible companies: Companies whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients (ex. advertising, marketing, or communication firms whose clients are ineligible companies; bio-medical startups that have begun a governmental regulatory approval process; compounding pharmacies that manufacture proprietary compounds; device manufacturers or distributors; diagnostic labs that sell proprietary products; growers, distributors, manufacturers or sellers of medical foods and dietary supplements; manufacturers of health-related wearable products; pharmaceutical companies or distributors; pharmacy benefit managers; reagent manufacturers or sellers)