

Conference Name

Speaker/Planner or  
Moderator Name

Financial  
Relationship  
Disclosed

Expert Reviewer  
Name (Course  
Director or Planner)

**Steps Taken:**

1. The Disclosed relationship is not relevant to the presentation (check and sign/date the form).
2. The disclosed relationship is relevant to the presentation but it is not with an ACCME/ ANCC defined Ineligible Companies - listed on page 2 (check and sign/date this form).
3. The disclosed relationship is relevant and with an Ineligible Company(s)- listed on page 2 (check and proceed to question 5).

4. Is the speaker/planner/moderator the employee or owner of an Ineligible Company(s) - listed on page 2

Yes : This relationship cannot be mitigated and cannot be awarded credit (There are just 3 circumstances when credit is allowed, see page 2)

No: Proceed to Question 5.

Yes, but it meets one of the exceptions on page 2.

The exception:

Prior to selecting an option below, please review the presentation for possible bias.

5. Presentation reviewed, no COI or commercial bias determined.  
Presentation will be limited to discussion of data and research. Another speaker without COI will close discussion by evaluating clinical implications and/or recommendations.  
Speaker has been asked to support presentation and cite recommendations based on "best available evidence".  
Planned presentation has been appropriately modified to be free of commercial bias. Discussion will be limited to generic names.  
Speaker/Moderator/Planner will be replaced.  
Proceed with speaker/presentation without credit designation.  
Planner disclosed any relevant possible conflicts of interest to the committee/did not show any bias in the planning/removed themselves from any relevant lectures.

Other

Expert Signature

Date

### **Eligible Companies That May Be Accredited:**

Ambulatory procedure centers  
Blood banks  
Diagnostic labs that do not sell proprietary products  
Electronic health records companies  
Government or military agencies  
Group medical practices  
Health law firms  
Health profession membership organizations  
Hospitals or healthcare delivery systems  
Infusion centers  
Insurance or managed care companies  
Nursing homes  
Pharmacies that do not manufacture proprietary compounds  
Publishing or education companies  
Rehabilitation centers  
Schools of medicine or health science universities  
Software or game developers

### **Ineligible Companies That Cannot Be Accredited:**

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

#### *Exceptions:*

- a. When the content of the activity is not related to the business lines or products of their employer/company.*
- b. When the content of the accredited activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations.*
- c. When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used.*

To view the Standards for Integrity and Independence Guidelines:

[Standards for Integrity and Independence in Accredited Continuing Education](#)