

## Conflict of Interest (COI) Disclosure Form

Name of Discloser \_\_\_\_\_

Instructor       Planner/Manager

Medical Education Resources (MER) has a policy to ensure balance, independence, objectivity, and scientific rigor in all our continuing education activities. We must disclose to the audience any real or apparent conflicts of interest (COI) with commercial interests whose products or services may be mentioned in the activity.

**The ACCME, ANCC and ACPE define a “commercial interest” as any proprietary entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients.** The ACCME, ANCC, and ACPE do not consider providers of clinical service directly to patients to be commercial interests. A COI exists when individuals have both a financial relationship with a commercial interest and the opportunity to affect the content of the education about the product or services of that commercial interest. As the accredited provider, we are responsible for collecting information from instructors, planners and managers of continuing education content and resolving those conflicts prior to the commencement of the activity. The intent of the COI resolution process is to assure that provider, faculty and planner financial relationships with commercial interests and resultant loyalties do not supersede the public interest in the design and delivery of certified activities for the profession. Any financial relationship with a commercial interest in the last 12 months is considered a conflict of interest.

MER does not allow the use of employees of ACCME-defined commercial interests as faculty and planners or in other roles where they are in a position to control the content of accredited CME.

List the names of proprietary entities producing health care goods or services, consumed by, or used on, patients, with the exemption of non-profit or government organizations and non-health care related companies with which you or your spouse/partner have, or have had, a relevant financial relationship within the past 12 months. For this purpose we consider the relevant financial relationships of your spouse or partner that you are aware of to be yours.

- Grants/Research Support \_\_\_\_\_
- Consulting Fees (eg. Ad boards) \_\_\_\_\_
- Speakers' Bureau \_\_\_\_\_
- Ownership Interest/Shareholder \_\_\_\_\_
- Royalty/Patent Holder \_\_\_\_\_

Neither I, nor my spouse/partner have had a conflict of interest (COI) with commercial interests whose products or services may be mentioned in the activity within the past 12 months.

### 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

- 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 a commercial interest. 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 commercial interest.
- I understand that to resolve any COI, MER will review my content/presentation prior to the activity, and I will 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 a commercial interest 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 a commercial interest, the information presented will be based on generally accepted scientific principles and methods, and will not promote the commercial interests of the commercial interest.

**I have carefully read, considered and agree to each item in this form, and have completed it to the best of my ability. I have read the Guidelines for Slide Creation on pages 3 - 4 and will adhere to those guidelines.**

Signature of reporting individual	Date
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## ACCME Standards for Commercial Support

As an ACCME, ANCC, ACPE and CDR accredited provider, MER requires that faculty members comply with the Standards for Commercial Support (SCS). We will be disclosing to participants if this activity is supported by an educational grant from a commercial interest. As a faculty member, you are required to disclose any personal financial interest or relationship that you may have with any commercial interest or the manufacturer(s) of any commercial product that is discussed in the activity.

MER has implemented a process that requires everyone who is in a position to control the content of an activity to disclose all relevant financial relationships with any commercial interest. In addition, should it be determined that a COI exists, this will need to be resolved prior to the activity.

We will utilize the information reported on this form to 1) determine if a conflict exists, 2) resolve the conflict by initiating a content validation process, and 3) advise learners of this information.

**Please note that the SCS require all providers to disqualify instructors, planners and managers that do not supply this information.**

## Guidelines for Content Development

This educational activity must follow the standards for CME established by the ACCME, AMA, ANCC, ACPE and FDA. Accordingly, please adhere to the following guidelines:

- Content should cover and teach to the learning objectives
- Content must be scientifically rigorous, present a fair-balanced discussion of all therapeutic options and products, be evidence based, and unbiased
- 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
- Content must be free from commercial bias, it should not advance the proprietary interests of any commercial company
- 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
- Any training or utilization by a commercial interest (eg. speakers' bureau) will not in any way include the promotional aspects or industry slides in the content of a continuing education presentation
- Slides or handout materials must not contain any **commercial graphic, logo, or product message**
- All published data, reference studies and articles cited in the content must be properly referenced on slides and handout materials

- 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
- All scientific research referred to, reported or used in support of justification of patient care recommendations should conform to the generally accepted standards of experimental design, data collection and analysis

## Glossary of Terms

### Commercial Interest

The ACCME defines a “commercial interest” as any proprietary entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. The ACCME, ANCC, and ACPE do not consider providers of clinical service directly to patients to be 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. ACCME and pertinent accrediting bodies consider relationships of the person involved in the activity to include financial relationships of a spouse or partner.

### Relevant financial relationships

ACCME and pertinent accrediting bodies focus on financial relationships with commercial interests in the 12-month period preceding the time that the individual is being asked to assume a role controlling content of the activity. ACCME and pertinent accrediting bodies have 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 ACCME defines “relevant” financial relationships” as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

### Conflict of Interest

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