**PLANNER/PRESENTER DISCLOSURE FORM**

*This form may be completed online:* [*www.cme.urmc.edu*](http://www.cme.urmc.edu)*, click on ‘My Disclosure’*

**PLEASE NOTE: If you have completed a disclosure form within the past 12 months, you may submit a copy of that form instead of completing this form again as long as the disclosure is still current.**

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| **Role(s) in Continuing Education Activities** | **🞎 Planning Committee 🞎 Presenter 🞎 Moderator 🞎 Content Expert 🞎 Author**  *Employees of ACCME-defined commercial interests are excluded from participation if the content relates to the business lines and products of their employer.* |

**Part 1: Biographical Information**

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| **Name** *(with credentials)* |  | | |
| **Title** |  | | |
| **Affiliation** |  | | |
| **Email Address** |  | **Phone Number** |  |

**Part 2: Conflicts of Interest1**

*This section must be completed by the individual contributing to the activity. Persons who fail to complete this form are not eligible to participate in the CME activity.*

**DIRECTIONS:**

1. Check the box(es) that most accurately describe your role. YOU MUST CHECK EITHER THE ‘NONE’ BOX OR 1 OR MORE OF THE OTHER BOXES.

2. List the commercial interests with which you or your spouse/partner have, or have had, a relevant financial relationship2 within the past 12 months.

3. Sign or type your name and date the form.

4. When relevant financial relationships2 are declared, resolution will be completed by the Activity Director or Designee.

5. All identified actual and potential COI will be disclosed to the CME activity participants.

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| **Nature of Relevant2 Financial Relationship** | **Name of Commercial Interest Organization(s)**  **Definition:** Any entity producing, marketing, re-selling, or distributing health care goods or services consumed by, or used on, patients. The ACCME does not consider providers of clinical service directly to patients to be commercial interests. |
| 🞎 Owner/Employee |  |
| 🞎 Consultant |  |
| 🞎 Grant/Research Support |  |
| 🞎 Major Stock Shareholder |  |
| 🞎 Speakers’ Bureau |  |
| 🞎 Other Financial/Material Support |  |
| 🞎 Other (please identify) |  |
| 🞎 NONE | Neither I nor my spouse/partner has any relevant financial relationships with any commercial interests in relation to my involvement with the content of the proposed activity. |

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| **To the best of my knowledge, I attest that the information provided above is correct and I will notify the Institute for Innovative Education if there are any changes.**  **SIGNATURE *(can be typed)*: DATE:** |

**1Conflict of interest** The ACCME considers financial relationships to create conflicts of interest in CME when individuals have both a financial relationship with a commercial interest ***and*** the opportunity to affect the content of CME about the products or services of that commercial interest. The potential for maintaining or increasing the value of the financial relationship with the commercial interest creates an incentive to influence the content of the CME—an incentive to insert commercial bias.

**2Relevant financial relationships** The ACCME requires anyone in control of CME content to disclose relevant financial relationships to the accredited provider. Individuals must also include in their disclosure the relevant financial relationships of a spouse or partner. The ACCME defines *relevant financial relationships* as financial relationships in any amount that create a conflict of interest and that occurred in the twelve-month period preceding the time that the individual was asked to assume a role controlling content of the CME activity. The ACCME has not set a minimal dollar amount—any amount, regardless of how small, creates the incentive to maintain or increase the value of the relationship. Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria for promotional speakers’ bureau, 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.

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| **Additional Resources** | |
| ACCME Accreditation Requirements | <http://www.accme.org/requirements/accreditation-requirements-cme-providers> |
| ACCME/AMA Glossary of Terms and Definitions | <http://www.accme.org/sites/default/files/011_20170421_Glossary_of_Terms.pdf> |
| Institute for Innovative Education (IIE)  Center for Experiential Learning (CEL) | <https://www.urmc.rochester.edu/institute-innovative-education/center-experiential-learning.aspx> |
| UR Policy for Identifying and Resolving Conflicts of Interest in CME | <https://www.urmc.rochester.edu/institute-innovative-education/center-experiential-learning/cme.aspx> |

*05.2019*