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| **Disclosure of financial relationships** |
| The purpose of this form is to gather information about all financial relationships with ineligible companies within the past 24 months. This ensures that accredited continuing education activities are fair, balanced, and support safe, effective patient care while protecting learners from commercial bias and marketing.  In accordance with The Standards for Integrity and Independence in Accredited Continuing Education, all planners, faculty, and others who can influence or control educational content must disclose the absence or existence of all financial relationships (of any dollar amount) with any ineligible companies within the past 24 months.  You should disclose all financial relationships *regardless* of the potential relevance of each relationship to the education.  **Ineligible companies** are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. (See page three for examples)  The Vizient CE program team reviews all submitted forms to identify relevant financial relationships with ineligible companies and determine if mitigation is necessary. If a mitigation strategy is required, a CE programs manager or designee will contact you via email. |
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| **CE Activity Title:** Click or tap here to enter text. | | | **Role(s) in Activity:** | | |
| **Name:** | Click or tap here to enter text. | | Course Director  Planner  Speaker/Presenter  Reviewer | Facilitator/Moderator  Author/Writer  Staff Coordinator  Other: | |
| **Employer:** | Click or tap here to enter text. | | | | |
| **Job** **Title:** | Click or tap here to enter text. | | | | |
| **Is your employer/company engaged in producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients?** | | | Yes  No | | |
| **Off-Label Use** | | | | | |
| **Do you intend to discuss products or services, off-label*,* or investigational use of drugs, and/or new and evolving topics that are not, or not yet adequately based on current science, evidence, and clinical reasoning?** | | | | Yes  No  If yes, please describe:  Click or tap here to enter text. | |
| **Disclosure** | | | | | |
| **In the past 24 months, have you had any financial relationships with an ineligible company of any dollar amount?** If yes, please identify the ineligible company and the nature of the relationship: | | | | Yes  No | |
| **Name of Ineligible Company** | | **Nature of Financial Relationship**  (See examples of financial relationships on page 3) | | **Has the Relationship Ended Within the Past 24 months?** |
|  | |  | | Yes  No |
|  | |  | | Yes  No |
|  | |  | | Yes  No |
|  | |  | | Yes  No |
|  | |  | | Yes  No |

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| **CE requirements (speaker/faculty):** | |
| * Any relationships with ineligible companies must not influence the accredited continuing education activity. It is my responsibility to notify the Vizient CE program team of any change with a financial relationship with an ineligible company that may have occurred since the submission of this form. * All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options. * All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation must conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation. * I must disclose to the audience, where applicable, that I will discuss any off-label or investigational use of drugs, new and evolving topics that are not, or not yet adequately based on current science, evidence, and clinical reasoning, without advocating, teaching how to perform, or promoting such uses. * Any clinical content presented must support safe and effective patient care. * Content must not advocate for unscientific approaches to diagnosis or therapy, or promote recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients. * Accredited education must be free of marketing or sales of products or services, I must not actively promote or sell products or services that serve my professional or financial interests during accredited education. | |
| **I have read and agree to abide by Vizient’s CE requirements as stated above:** | **Yes  No** |

By signature below, you attest that you have read this form and completed it to the best of your knowledge.  
 **Typed Signature:**  Click or tap here to enter text. **Date:** Click or tap to enter a date.



**Guidance: Disclosure of financial relationships**

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| **Financial Relationships** | | |
| **Definition:** Any relationship 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. Research grants from ineligible companies are financial relationships that should be disclosed, even if the funds go to the researcher’s institution and not to the individual researcher**.** | | |
| **Examples of Financial Relationships** | | |
| * Employee (salary) * Researcher * Consultant * Advisor * Speaker * Independent contractor (including contracted research) * Fees received for promotional services, regardless of their source (e.g., speakers bureau presentations that are not accredited for a CE activity) | | * Royalties or patent beneficiary * Executive role * Ownership interest * Individual stocks and stock options * Speaker |
| **Ineligible Companies** | | |
| Financial relationships with “ineligible” companies that require disclosure are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. | | |
| **Examples of such organizations include:** | | |
| * 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 | | |
| **Eligible Companies** | | |
| Financial relationships with “eligible” companies do **NOT** require disclosure. | | |
| **Examples of such organizations include:** | | |
| * 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 | |