



**IDENTIFICATION AND MITIGATION OF RELEVANT RELATIONSHIPS OF PLANNERS,
FACULTY AND OTHERS**

TITLE OF ACTIVITY	
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STEP 1: IDENTIFY ANY EMPLOYEES/OWNERS OF INELIGIBLE COMPANIES

If you identified any prospective planners, faculty, or any other persons who may control content that are employees or owners of ineligible companies, they must be excluded from participation. Upon identification, take steps to inform the ineligible party of exclusion in the activity.

For information about exceptions to this exclusion, see **accme.org/standards**.

Ineligible companies are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

DOCUMENTATION OF RECUSAL FROM ACTIVITY FOR EMPLOYEES/OWNERS OF INELIGIBLE COMPANIES.

Name	Name of Ineligible Company	Date of Notification

STEP 2: DETERMINE RELEVANT RELATIONSHIPS

Determine whether each person’s financial relationships with ineligible companies are relevant to the content of the education you are planning.

Financial relationships are relevant if the following three conditions are met for the prospective person who will control content of the education:

- A financial relationship, in **any amount**, exists between the person in control of content and an ineligible company.
- The financial relationship existed during the past **24 months**.
- The content of the education is related to the products of an ineligible company with whom the person has a financial relationship.

STEP 3: SELECT MITIGATION STRATEGY

Implement strategy prior to person assuming role.

Mitigation Steps for Planners (choose at least one)	Mitigation Steps for Faculty (choose at least one)
Divest the financial relationship Recusal from controlling aspects of planning and content with which there is a financial relationship Peer review of planning decisions by persons without relevant financial relationships Use other methods (<i>please describe</i>):	Divest the financial relationship Peer review of content by persons without relevant financial relationships Attest that clinical recommendations are evidence-based and free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based practice guidelines) Use other methods (<i>please describe</i>):

DOCUMENTATION OF MITIGATION STRATEGY(IES) USED FOR EACH PERSON WITH A RELEVANT FINANCIAL RELATIONSHIP

NAME OF PERSON	ROLE(S) IN ACTIVITY	STEPS TAKEN TO MITIGATE RELEVANT FINANCIAL RELATIONSHIP	MITIGATION COMMUNICATION METHOD (email, phone call, text, etc.)	DATE OF IMPLEMENTATION
<i>Example: Doctor Smith</i>	<i>Planner</i>	<i>Recusal from relevant topic</i>	<i>E-mail</i>	<i>01/01/21</i>

DOCUMENTATION OF INDIVIDUALS WITH NOTHING TO DISCLOSE

NAME OF PERSON	ROLE(S) IN ACTIVITY