



DISCLOSURE FORM FOR IDENTIFYING ALL FINANCIAL INFORMATION FOR
FACULTY, PLANNERS AND OTHERS

NAME		ACTIVITY DATE	
TITLE OF ACTIVITY			

INDIVIDUAL'S PROSPECTIVE ROLE IN ACTIVITY	PLANNER ☐	FACULTY/TEACHER ☐	CONTENT REVIEWER ☐	AUTHOR/WRITER ☐	OTHER ☐
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As a prospective planner or faculty member, we would like to ask for your help in protecting our learning environment from industry/influence. KMA accreditation requirements and ACCME Standards for Integrity and Independence require that we disqualify individuals who refuse to provide this information from involvement in the planning and implementation of accredited continuing education.

The Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence require **all** financial relationships between individuals that can control or influence the content of an activity (speakers, planning committee members, content reviewer, etc.) and ineligible companies be evaluated to determine if the possibility exists for industry influence in the learning environment of an accredited continuing educational activity. If any relationship exists, it must be mitigated prior to the activity.

Please disclose **all financial relationships** that you have had **in the past 24 months** with ineligible companies (see definition below).

For each financial relationship, enter the name of the ineligible company and the nature of the financial relationship(s).

There is no minimum financial threshold; we ask that you **disclose all financial relationships, regardless of the amount, with ineligible companies.**

You should disclose all financial relationships regardless of the potential relevance of each relationship to the education.

Examples of natures of relationships: Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed.

Important Note Regarding Funds from Research: Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the grant and manages the funds.

Please complete the form below in its entirety and return to the CME/Education Department by _____.

Please disclose **all financial relationships** that you have had in the **past 24 months** with ineligible companies (see definition below).

For each financial relationship, enter the name of the ineligible company and the nature of the financial relationship(s).

There is no minimum financial threshold; we ask that you disclose all financial relationships, regardless of the amount, with ineligible companies.

You should disclose all financial relationships regardless of the potential relevance of each relationship to the education

If you have not had any financial relationships with any ineligible companies in the past 24 months, please indicate here:

☐ (mark checkbox and initial here)

Enter the Name of Ineligible Company An ineligible company is any entity whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.	Enter the Nature of Financial Relationship Examples of financial relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.	Has the Relationship Ended? If the financial relationship existed during the last 24 months, but has now ended, please check the box in this column. This will help the education staff determine if any mitigation steps need to be taken.
Example: ABC Pharmaceuticals	Speaker	☐
		☐
		☐
		☐
		☐
		☐
		☐
		☐
		☐
		☐

CONTENT VALIDATION REVIEW AND ATTESTATION:

Directions: Please review the statements below related to KMA expectations to ensure content validity, then **read and check ALL** of the following boxes to attest to your understanding and willingness to comply with the corresponding statement.

☐	All clinical recommendations that I make for patient care as a part of my CME presentation will be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options.
☐	To the extent practical, recommendations involving clinical medicine will be substantiated by peer-reviewed sources. I will make meaningful disclosure to the learners if off-label use is discussed.
☐	All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation will conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.
☐	I will not present any content that are not, or not yet, adequately based on current science, evidence and clinical reasoning.
☐	I will not present any content that advocates for unscientific approaches to diagnosis or therapy, or if the education promotes 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. When appropriate, generic names from several companies will be used.
☐	I will not utilize any logos in my presentation.
☐	CME content presented to learners will be free of commercial bias. No product, service or therapeutic option will be over-represented when comparing competing products, services and therapeutic options.



CONSIDER THESE BEST PRACTICES WHEN PRESENTING CLINICAL CONTENT IN ACCREDITED EDUCATION:

- Clearly describe the level of evidence on which the presentation is based and provide enough information about data (study dates, design, etc.) to enable learners to assess research validity.
- Ensure that, if there is a range of evidence, that the credible sources cited present a balanced view of the evidence.
- If clinical recommendations will be made, include balanced information on all available therapeutic options.
- Address any potential risks or adverse effects that could be caused with any clinical recommendations.

CONTENT VALIDATION REVIEW AND ATTESTATION FOR **PLANNERS**:

Directions: Please review the statements below related to KMA expectations to ensure content validity, then **read and check ALL** of the following boxes to attest to your understanding and willingness to comply with the corresponding statement.

☐	All clinical recommendations that I may help plan as part of CME presentations will be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options.
☐	To the extent practical, recommendations involving clinical medicine will be substantiated by peer-reviewed sources. I will ensure that meaningful disclosure to the learners if off-label use is discussed.
☐	All scientific research referred to, reported, or used in accredited education in support or justification of a patient care recommendation will conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation.
☐	I will not plan or facilitate the delivery of contents that are not, or not yet, adequately based on current science, evidence and clinical reasoning.
☐	I will not plan or facilitate the delivery of content that advocates for unscientific approaches to diagnosis or therapy, or if the education promotes 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. When appropriate, generic names from several companies will be used.
☐	I will ensure that no logos or trade names are used in aspect related to the educational activity.
☐	CME content presented to learners will be free of commercial bias. No product, service or therapeutic option will be over-represented when comparing competing products, services and therapeutic options.



CONSIDER THESE BEST PRACTICES WHEN PRESENTING CLINICAL CONTENT IN ACCREDITED EDUCATION:

- **Clearly describe the level of evidence on which the presentation is based** and provide enough information about data (study dates, design, etc.) to enable learners to assess research validity.
- Ensure that, **if there is a range of evidence**, that the **credible sources cited present a balanced view** of the evidence.
- **If clinical recommendations** will be made, **include balanced information on all available therapeutic options**.
- **Address any potential risks or adverse effects** that could be caused with any clinical recommendations.

CORE CRITERIA CONSIDERATIONS

What is the practice-based problem (gap) will this education address?	
What is/are the reason(s) for the gap? How are your learners involved?	
Who is the target audience for this activity?	
What new strategies can learners expect to apply in practice based on their participation in this activity?	
What change(s) in strategy, performance, or patient care would you like this education to help learners accomplish?	
What are the objectives for this activity?	

☐ I attest that the above information is correct as of this date of submission.

Signature_____Date_____