Financial Relationship, Identification, Mitigation and Disclosure Determination

Non-Clinical
- Ex) Leadership, preceptor, communication skills training, faculty development
- No financial disclosure forms needed
- No mitigation or disclosure needed

Clinical
- Obtain financial disclosure or equivalent documentation from everyone who is in a position to control content
- Exclude owners/employees from ineligible companies (see exceptions)
- Determine if there is a financial relationship with an ineligible company within the last 24 months
- Yes, there are relevant financial relationships-documet on mitigation worksheet or equivalent documentation
- Mitigation required-choose strategy
- No, there are no relevant financial relationships-document on mitigation worksheet or equivalent documentation
- Mitigation not required

-Disclosure to learners-
There are no relevant financial relationships with ineligible companies for those involved with the ability to control the content of this activity.

-Disclosure to learners -
Dr. Yvonne Gbeho, PhD, NP-BC, is faculty, for this educational event, and has received a research grant from ABC Pharmaceuticals. The relevant financial relationships listed for this individual has been mitigated.
Financial Relationship, Identification, Mitigation and Disclosure Determination

**Ineligible company**-an entity whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients

**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

**Exclude owners/employees of ineligible companies** from participating as planners/speakers unless one of the three exceptions apply:

- When the content of the activity is not related to the business lines or products of their employer/company
- When the content of the approved activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations
- When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used

***Even though these exceptions exist – their financial relationship must still be disclosed to learners***