



***Worksheet for the Identification and Mitigation of Financial Relationships of
Speakers / Moderators***

Use this worksheet to choose a mitigation strategy for each speaker who has a relevant financial relationship and implement that strategy before the person assumes their role. **Owners or employees of ineligible companies are excluded from participating as planners or faculty.** Ineligible companies are those whose primary business is producing, marketing, selling, reselling, or distributing healthcare products used by or on patients.

Name of Peer Reviewer (please print First and Last Name, Credential):
Title:
School/Organization:

Please review each person’s financial relationship that is relevant to the educational content for this activity



PLEASE NOTE: If you have been employed within the past 24 months or are currently an employee of an ineligible company (as defined above) you will be prohibited from any further participation in this activity.

	Using the list below, identify which mitigation strategy(ies) will be used for speakers with relevant financial relationships who control the educational content of the educational activity. You may select multiple strategies but be sure to use strategies appropriate to the role(s) that each person has. You can also identify your own strategies for mitigation.
<input type="checkbox"/>	Divest the financial relationship (please explain)
<input type="checkbox"/>	Peer review of content by persons without relevant financial relationships (please explain)
<input type="checkbox"/>	Attest that clinical recommendations are evidence-based and free of commercial bias (e.g., peer-reviewed literature, adhering to evidence-based guidelines)
<input type="checkbox"/>	No resolution required (Please explain)
<input type="checkbox"/>	Other method (Please explain)

Name of Person	Role(s) in Activity	Step(s) Taken to Mitigate Relevant Financial Relationship	Date Implemented
Example: Bob Jones, MD	Speaker	Peer review of presentation (provide explanation)	10/28/2021

Please Sign and Date: Click or tap here to enter text.

Revised 10/10; 6/11; 3/12; 4/14; 8/15; 5/21;7/21, 2/22; 10/23

Explain mitigation strategy here:
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