**Rush University**

**Biographical and Conflict of Interest Form**

Title of Educational Activity:       Date of Activity:

**Section 1: Biographic Data**

 Name:

 Credentials: [ ]  MD [ ]  DO [ ]  MBBS [ ]  PhD [ ]  DNP [ ]  MSN [ ]  BSN

 [ ]  PharmD [ ]  Other

 Address:

 Phone Number:       Email Address:

 Current Employer and Position/Title:

**Section 2: Role in Educational Activity**

Select your role in educational activity listed above (check all that apply):

 [ ]  Course Director **\***

 [ ]  Planning Committee Member

 [ ]  Content Expert/Reviewer

 [ ]  Faculty/Presenter/Author

 [ ]  Other

**\*The Course Director is responsible for ensuring adherence to ACCME, ACPE, and ANCC accreditation criteria.**

**Section 3: To be Completed by Individuals Who Are NOT Employees of Rush University Medical Center**

[ ]  I am not an employee of RUMC. A current CV will accompany this form to demonstrate my qualifications to participate in planning/presenting this activity.

**Section 4: Conflict of Interest – To be Completed by Planner, Faculty, or Others Who May Control Educational Content**

As a prospective planner or faculty member, we would like to ask for your help in protecting our learning environment from industry influence. The ACCME Standards for Integrity and Independence require that we disqualify individuals who refuse to provide this information in the planning and implementation of accredited continuing education.

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

After we receive your disclosure information, we will review it to determine whether your financial relationships are relevant to the education. The identification of relevant financial relationships does not necessarily mean that you are unable to participate. The accreditation standards require that all financial relationships are mitigated before you assume your role in this activity.

As an important contributor to our accredited education, we would like to enlist your help to ensure that educational content is fair and balanced, and that any clinical content presented supports safe, effective patient care. This includes expectations that:

* All recommendations for patient care in accredited continuing education must be based on current science, evidence, and clinical reasoning, while giving a 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.
* Although accredited continuing education is an appropriate place to discuss, debate, and explore new and evolving topics, these areas need to be clearly identified as such within the program and individual presentations. It is the responsibility of accredited providers to facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet adequately based on current science, evidence, and clinical reasoning.
* Content cannot be included in accredited education if it 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 I the treatment of patients.

The ACCME Standards for Integrity and Independence prohibits actively promoting or selling products or services during accredited education.

Is there a financial relationship in any amount with any ineligible entity\* for you in the last 24 months?

 [ ]  Yes [ ]  No

**If yes,** please describe the nature of the relationship with ineligible entities. If the financial relationship existed during the past 24 months, but has now ended, please indicate that.

Check all that apply:

[ ]  Research grant from

[ ]  Royalty (describe product and entity)

[ ]  Stockholder (list commercial interests and products)

Are you a stockholder of a privately owned company? [ ]  Yes [ ]  No

[ ]  Member, Speakers Bureau for

[ ]  Consultant to

[ ]  Salary from

[ ]  Other (describe relationship and commercial entity)

**Section 5: Adherence to FDA Guidelines**

# FDA APPROVED DRUG AND DEVICES ASSURANCE STATEMENT

FDA guidelines require that any discussions regarding the utilization of FDA approved drugs or devices must be within approved regulations. If you discuss the utilization of FDA drugs or devices that are outside approved regulations, you must clearly delineate this for your audience.

**[ ]**  Yes, I have read and agree to abide by FDA regulations regarding FDA approved uses and regulations of the utilization of drugs and devices.

**Section 6: Statement of Understanding**

An “X” in the box below serves as the electronic signature of the individual completing this Biographical/Conflict of Interest Form and attests to the accuracy of the information given above.

**Electronic Signature (Required):** **[ ]**   **Date:**

**Completed By (Name and Credentials):**

**Section 7: Review and Conflict Mitigation (to be completed by Course Director or other designated individual)**

Review definitions at the end of this document. Then, select one:

[ ]  I have reviewed this disclosure and the above named individual has disclosed no relevant conflict of interest. (Sign the form below.)

[ ]  I have reviewed this disclosure and the above named individual has disclosed a relevant conflict of interest. The procedures used to mitigate conflict of interest or potential bias for the above individual for this activity include (Check all that apply, then sign the form below.):

[ ]  Reviewed the individual’s disclosed conflict and determined that it is not relevant to his/her role in the educational activity.

[ ]  Removed individual with conflict of interest from participating in parts of the educational activity.

[ ]  Revised the role of the individual with conflict of interest so that the relationship is no longer relevant to the educational activity.

[ ]  Undertaking review of the planning process of the activity, including selection of topics/speakers based on the best available evidence.

[ ]  Undertaking review of the educational activity by a content reviewer to evaluate for potential bias, balance in presentation, evidence-based content or other indicators of integrity, and absence of bias.

[ ]  Monitoring the educational activity to evaluate for commercial bias in the presentation.

[ ]  Reviewing participant feedback to evaluate for commercial bias in the activity.

[ ]  Other - Describe:

 **Course Director Signature (\*If form is for the activity Course Director, an individual other than the Course Director must review and sign.)**

An “X” in the box below serves as the electronic signature of the Course Director or other individual reviewing the content of this Biographical/Conflict of Interest Form.

 **Electronic Signature (Required):** **[ ]  Date:**

 **Course Director/Reviewer Name and Credentials:**

**\**Ineligible entities are***  defined as any entities whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. Providers of clinical service directly to patients are not considered ineligible unless the provider of clinical service is owned, or controlled by, an ACCME-defined ineligible entity.

For the purposes of continuing education in the health professions, an organization is an ineligible organization if the 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.

(\*Reference: Accreditation Council for Continuing Medical Education (ACCME) Standards for Integrity and Independence in Accredited Continuing Education, 2021 (www.accme.org).

**\*\**Financial relationship****,* is defined as a relationship with an ineligible company

* 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 and identified as holdings in either a private or publicly held company
* 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.
* The **owners and employees of ineligible companies** are considered to have **unresolvable financial relationships** and must be excluded from participating as planners or faculty, and must not be allowed to influence or control any aspect of the planning, delivery, or evaluation of accredited continuing education, except in the following limited circumstances:

a. When the content of the activity is not related to the business lines or products of their employer/company.

b. When the content of the accredited 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.

c. When they are participating as technicians to teach the safe and proper use of medical devices.