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| **MITIGATION OF RELEVANT FINANCIAL RELATIONSHIPS**  A **mitigation strategy** for individuals with relevant financial relationships in control of educational content with ineligible companies (*those whose primary business is producing, marketing, selling- re-selling, or distributing* *healthcare products used by or on patients*) **must be implemented before each person takes on their role**.   1. Review collected information about financial relationships and **exclude owners or employees** **of** **ineligible companies** from participating as planners or faculty. 2. **Determine** whether each person’s **financial relationship** with ineligible companies is **relevant** to the content of the education you are planning. They are relevant if: 3. financial relationships exist in **any amount** between the person in control of content and the ineligible company 4. the financial relationship existed during the **past 24 months.** 5. the **content** of the education is related to the products of an ineligible company with whom the person has a financial relationship 6. Choose a **mitigation strategy** for the individual and implement that strategy before the person assumes his/her role. Choose the appropriate strategy for the role the person assumes. |
| **Name of individual:** |
| **Role of Individual:**  Planner (Examples: planning committee, staff involved in choosing topics, faculty, and/or content)  Teacher, Instructor, Faculty, Speaker  Author, Writer  Reviewer  Other, specify: |
| **Name & Date of Activity:** |

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| **Mitigation for PLANNERS** (choose at least one) | **Mitigation for SPEAKERS/others** (choose at least one) | |
| **Divest** the financial relationships  **Recusal** from control of aspects planning/content with which there is financial relationship  **Peer review** of planning decisions by persons without relevant financial relationship  **Determined** financial relationship(s) are  **not relevant** to content of education  **Other**, please describe | **Divest** the financial relationships  **Peer review** of content by persons without relevant financial relationships  Attest that content & clinical recommendations are **evidence-based** and **free of commercial bias**  **Determined** financial relationship(s) are  **not relevant** to content of education  **Other**, please describe | |
| **Name of Reviewer:** | | **Date Reviewed:** |