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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.
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| **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:**       |