CONFLICT OF INTEREST (COI) MANAGEMENT AND RESOLUTION

Yes

Does individual disclose financial relationships?

Disclosure sent to all individuals in a position to influence or control content of educational activity

No

Is individual willing to complete disclosure?

Yes

Disclosure information is reviewed by OCPD and designated planning committee reviewer

No

Individual cannot participate in planning educational activity

Update COI grid per COI Grid Guidelines

Yes

Individual can participate in educational activity planning

No

Is the relationship a relevant financial relationship with an ACCME-defined commercial interest and therefore presents a potential COI?

If all 4 boxes are checked, it's a relevant financial relationship

- Financial relationship between person in control of content (or their spouse/partner) and an ACCME-defined commercial interest
- Any amount
- In the past 12 months prior to the activity
- Products/services of the ACCME-defined commercial interest with which the person has the financial relationships are related to the content of the CME activity

Yes

Determine appropriate action to manage and resolve COI

No

Individual cannot participate in planning educational activity

Actions to manage and resolve COI

- Review presentation content (peer or independent review)
- Contact speaker regarding presentation content
- Refer to Course Director or Planning Committee member for additional review
- Other actions as needed

Document decision and discussion between OCPD and Planning Committee. No financial disclosure forms need to be completed.

Before activity, disclose to learners there are no relevant financial relationships with ACCME-defined commercial interests for anyone who was in control of the activity's content.

Update COI grid with COI management or resolution plan and notes, per COI Grid Guidelines

Individual can participate in planning CME activity per COI management and resolution plan

Individual can participate in planning CME activity per COI management and resolution plan

Is the content related to products or business lines of an ACCME-defined commercial interest?

Yes

No

Before activity, disclose to learners there are no relevant financial relationships with ACCME-defined commercial interests for anyone who was in control of the activity's content.

Individual can participate in planning CME activity per COI management and resolution plan

If all 4 boxes are checked, it's a relevant financial relationship

- Financial relationship between person in control of content (or their spouse/partner) and an ACCME-defined commercial interest
- Any amount
- In the past 12 months prior to the activity
- Products/services of the ACCME-defined commercial interest with which the person has the financial relationships are related to the content of the CME activity

Last revised: 8/06/2018
Conflict of Interest review must be documented

**No financial relationship(s) disclosed**
Update “Is there a potential COI” column on COI grid to “no”, include your initials and the date

**Non-relevant financial relationship(s) disclosed**
Update “Is there a potential COI” column on COI grid to “no”, include your initials and the date

**Relevant financial relationship(s) disclosed**
- Update “Is there a potential COI” column on COI grid to “yes”, include your initials and the date
- Determine which of the following COI management/resolution action plan will effectively manage or resolve this COI
  - Review presentation content (peer or independent review)
  - Contact speaker regarding presentation content
  - Refer to Course Director or Planning Committee member for additional review
  - Other actions as needed (include detailed notes on COI grid)
- Update “COI management/resolution plan” column to reflect which action plan was taken
- Update “Notes” column on COI grid with additional information

Learners must be informed of disclosure information prior to the start of the activity

**For activities with content related to products/business lines of an ACCME-defined commercial interest**
Include disclosure information in onsite materials distributed to learners and/or include a disclosure slide that is displayed prior to the start of the educational content; see available slide template

**For activities with content that is NOT related to products/business lines of an ACCME-defined commercial interest as determined by OCPD and Planning Committee, no Financial Disclosure forms are collected**
Include disclosure information in onsite materials distributed to learners and/or include a disclosure slide that is displayed prior to the start of the educational content.
Language should reflect, “There are no relevant financial relationships to report on behalf of the planning committee or presenters. This activity provides a focus on __________ and does not discuss healthcare goods/services.”

Last revised: 8/06/2018