

**Identification and Mitigation of Relevant Financial Relationships (Planning Committee)**

- This form **MUST** include any planning committee members whom disclosed financial relationships before assuming their role in the planning of the CE activity.
- The Course Director (or designee), **with no financial relationships**, is responsible for implementing a mitigation strategy prior to the individual assuming their role in the session. **Note: A designee must have sufficient clinical knowledge.**

For additional guidance visit: <http://cce.upmc.com/coi>.

**Mitigation strategies (multiple strategies may be selected):**

1. The relationship has ended.
  2. The individual is an employee of an ineligible company or owns private stock in an ineligible company and **MUST BE** excluded from participating.
  3. Recusal from controlling aspects of planning and content with which there is a financial relationship.
  4. Peer review of planning decisions by persons without relevant financial relationships. \*List the person(s):
  5. Other mitigation strategies must be approved by the UPMC Center for Continuing Education in the Health Sciences.
- Most Common {

**Step 1** Who was responsible for mitigation?

Course Director **OR**

\*Designee:

*\*COI Disclosure Form must be included*

**Step 2:** List each individual/relationship on a separate line.

**Step 3:** Select the mitigation strategy implemented from the list above.

**Name**

**Company Name**

**Nature of the Relationship**

**Mitigation Strategy**

**Date Implemented**