

Identification and Mitigation of Relevant Financial Relationships (Planning Committee)

- This form MUST include any planning committee members who 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):

- Most Common {
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 planning content related to the relationship.

4. Peer review of planning decisions by persons without relevant financial relationships. \*List the person(s):

5. The content of the entire activity is non-clinical (such as leadership or communication skills training).

Other mitigation strategies must be approved by the UPMC Center for Continuing Education in the Health Sciences.

**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
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