

Individuals who have the ability to control or influence the content of an educational activity must disclose all financial relationships with any **ineligible company** over the **previous 24 months** regardless of the relevance to the education. There is no minimum financial threshold. Refusal to provide this information will disqualify you from involvement in the planning and implementation of accredited continuing education. Ineligible companies are those whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. Examples of relationships include employee, researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Stock and stock options should be disclosed; diversified mutual funds do not need to be disclosed.

Tip: If the form is not allowing you to enter information, copy and paste <https://cce.upmc.com/disclosure> to your browser, complete form and then save to your computer.

Activity Title: _____

Activity Start Date (mm/dd/yyyy): _____

First and Last Name: _____

Prospective role(s) (check all that apply):

☐ Planner (involved in choosing topics, faculty, or content)

☐ Teacher, Instructor, Presenter, Faculty

☐ Other: _____

Check applicable disclosure statement:

☐ In the past 24 months, I have not had any financial relationships with any ineligible company.

☐ I have had a financial relationship with an ineligible company (defined above). Enter the name of the ineligible company for each financial relationship(s), regardless of the potential relevance to the education.

Nature of Relationship

Company Name (only include companies that meet the definition of an ineligible company as defined above)

CE Speakers' Bureau: _____

Consultant: _____

Grant/Research Support: Funding from ineligible companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.

Grant/Research Support: _____

Stock and Stock Options: Diversified mutual funds do not need to be disclosed. Stock through privately held ineligible companies are considered owners or employees and therefore must be excluded from planning or implementation of the education (or qualify for an exception).

Stock (publicly traded): _____

Stock (privately held): _____

Stock Options: _____

Other: Please disclose all other financial relationships with an ineligible company (e.g., employee, royalties). List the name of the company and describe the nature of the relationship.

Other: _____

Have any of the relationships listed above ended?

☐ No, all of the relationships listed above are active.

☐ Yes, list company(ies) name/date ended: _____

Attestation

☐ I understand that all content must be balanced, based upon the best available scientific evidence, and free of commercial influence and abide by applicable patient privacy and copyright provisions.

☐ I attest that I am the individual participating in the activity and the above information is correct as of the date of this submission and I agree to update this form if any information changes and/or a new financial relationships exist.

Date (MM/DD/YYYY): _____

Step 7: The date the speaker completed the form.

*Attestation dates are valid for 1 year (i.e: if the form was completed on 1/1/2025, that form is valid until 1/2/2026)

Step 1: Enter Series Title

Step 2: The date the activity started, could be 1/1/2025 if the series was renewed for 2025

Step 3: Speaker's Name

Step 4: Individual's role in the session

Step 5A: The individual needs to select whether they have or have not had any financial relationships with any *ineligible companies** in the past 24 months

*Definition and examples are listed at the top of the form

Step 5B: The financial relations need disclosed and listed in the appropriate category

Step 5C: If relationships are disclosed, the speaker needs to indicate if they are active or not

Step 6: Both boxes need checked by the speaker