

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):

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 (or qualify for an exception). For consideration of an exception, please reach out to your CCEHS contact for guidance.
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.

Name	Company Name	Nature of the Relationship
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Step 3: Select the mitigation strategy implemented from the list above.

Mitigation Strategy	Date Implemented
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