**Template for Relevant Financial Relationships Involving Owners and Employees of Ineligible Entities**

This form must be completed for anyone who has disclosed ownership interest or employment with an ACCME-defined ineligible entity. Owners of stock in privately held ineligible companies are considered owners or employees by the ACCME. For more information, please visit [The Accreditation Council for Continuing Medical Education](https://accme.org/accreditation-rules/standards-for-integrity-independence-accredited-ce) website.

|  |  |  |
| --- | --- | --- |
| **Activity Name:** Click or tap here to enter text. | | **Activity Start Date:** Click or tap to enter a date. |
| **Faculty Name:** Click or tap here to enter text. | | **Role in the Activity:** Choose an item. |
| **Company Name:** Click or tap here to enter text. | | **Company website:** Click or tap here to enter text. |
| **Relationship:** Click or tap here to enter text. | | **Other comments:** Click or tap here to enter text. |
| **This section should be completed by Course Director and/or Faculty** | | **Date completed:** Click or tap to enter a date. |
| **If stockholder\*, is the company privately held or publicly traded?** Choose an item. | \*Owning stock *options* is not considered ownership or employment and does not require completion of this form. | |
| **Warning with solid fill If publicly traded, STOP HERE. You do not need to complete the rest of the form.**  **If privately held, please answer the questions below.** | | |
| **Has the company initiated a** [**governmental regulatory process**](https://www.accme.org/faq/10236) **for any of its products?** Choose an item. | | |
| **Warning with solid fillIf a governmental regulatory approval process will NOT be initiated by the time of the activity, STOP HERE. You do not need to complete the rest of the form.** | | |
| **Describe the business lines or products of the company:** Click or tap here to enter text. | | |
| **Describe the content of the presentation(s) being planned:** Click or tap here to enter text. | | |
| **Does the content relate to the business lines or products of the ineligible company\*\*?** Choose an item.  *\*\*It is insufficient to simply refrain from discussing the specific product or service of the ineligible company. Ask yourself, is there opportunity in my presentation to insert bias towards the company or its products?*  **If no, please explain why not:** Click or tap here to enter text.  **If yes, this presentation may not be eligible for CME. The OCME will be in contact to discuss next steps.** | | |

*For further clarity, see* [*the ACCME's FAQ*](https://accme.org/faq/standard-32-what-are-some-examples-content-or-not-related-business-lines-ineligible-company) *titled “Standard 3.2: What are some examples of content that is or is not related to the business lines of the ineligible company?”*

|  |  |
| --- | --- |
| **This section will be completed by the Office of CME** | **Date completed:** Click or tap to enter a date. |
| **Is the company an ACCME-defined ineligible entity?** Choose an item. | |
| **Why or why not?** Click or tap here to enter text. | |
| **If it is determined that an individual is an owner/employee of an ineligible company, do they meet one of the ACCME’s exceptions? Select applicable exception below:** Choose an item. | |
| **Provide rationale for why this exception applies:** Click or tap here to enter text. | |
| **Final determination:** Choose an item. | |