

From ACPE --

The ACPE offers this document as a template for providers to use for obtaining relevant financial relationship information. With modification it could be used for teachers, authors and members of planning committees. It offers the provider the opportunity to be explicit about the expectations of the CPE enterprise.

Providers are **NOT** required or expected to use this letter. ACPE is not recommending this document. The use of this document will not guarantee an ACPE finding of 'Compliance' for the Standards of Commercial SupportSM.

Dear <insert name of Faculty Member/Author/Teacher>:

RE: Relevant Financial Relationships with Commercial Interests

We are pleased that you are willing and able to participate in our CPE activity scheduled for <Insert date> at the <insert location> in <insert city>.

<Insert Accredited Provider Name> is accredited by the Accreditation Council for Pharmacy Education (ACPE). As such, we have made the choice to meet the ACPE's expectations for our practice of continuing medical education. Our accreditation is important to us. We look forward to working together to provide CPE at the highest standard.

The activity we have asked you to participate in is based on <insert identified need>. We have planned the activity so that <insert expected result>. The purpose or objective of your contribution is <insert purpose or objective> and we expect the content will relate to <insert summary of content>.

<Insert Accredited Provider Name> has implemented a process where everyone who is in a position to control the content of an education activity has disclosed to us all relevant financial relationships with any commercial interest (see below for definitions). In addition, should it be determined that a conflict of interest exists as a result of a financial relationship you may have, this will need to be resolved prior to the activity. In order to do this, please provide us with the following information by <insert date>. This information is necessary in order for us to be able to move to the next steps in planning this CPE activity. If you refuse to disclose relevant financial relationships, you will be disqualified from being a part of the planning and implementation of this CPE activity.

First, list the names of proprietary entities producing health care goods or services, consumed by, or used on, patients, with the exemption of non-profit or government organizations and non-health care related companies with which you or your spouse/partner have, or have had, a relevant financial relationship within the past 12 months. For this purpose we consider the relevant financial relationships of your spouse or partner that you are aware of to be yours.

Second, describe what you or your spouse/partner received (ex: salary, honorarium etc). <Insert Accredited Provider Name> does NOT want to know how much you received.

Third, describe your role.

Commercial Interest	Nature of Relevant Financial Relationship (Include all those that apply)	
	What I received	My role
Example: Company 'X'	Honorarium	Speaker

I do not have any relevant financial relationships with any commercial interests

Signature _____

Date _____

What was received: Salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit.

My Role(s): Employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities.

Again, thank you for agreeing to work with us in this CPE activity. We look forward to this activity making an important contribution to the continuing professional development of our learners and to your professional practice.

Sincerely,

<Insert Name>

<Insert Job Title>

Glossary of Terms

Commercial Interest

The ACPE defines a “commercial interest” as any entity producing, marketing, reselling, or distributing health care goods or services consumed by, or used on, patients. Providers of clinical services directly to patients are not ‘commercial interests.’

Financial relationships

Financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, consulting fee, honoraria, ownership interest (e.g., stocks, stock options or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial benefits are usually associated with roles such as employment, management position, independent contractor (including contracted research), consulting, speaking and teaching, membership on advisory committees or review panels, board membership, and other activities from which remuneration is received, or expected. ACPE considers relationships of the person involved in the CPE activity to include financial relationships of a spouse or partner.

Relevant financial relationships

ACPE focuses on financial relationships with commercial interests in the 12-month period preceding the time that the individual is being asked to assume a role controlling content of the CPE activity. ACPE has not set a minimal dollar amount for relationships to be significant. Inherent in any amount is the incentive to maintain or increase the value of the relationship. The ACPE defines “relevant” financial relationships” as financial relationships in any amount occurring within the past 12 months that create a conflict of interest.

Conflict of Interest

Circumstances create a conflict of interest when an individual has an opportunity to affect CPE content about products or services of a commercial interest with which he/she has a financial relationship.