Office of Continuing Professional Development
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FREE
Faculty Resources for Educational Excellence

Upcoming Events
Download our **3-months-at-a-glance calendar**.

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Carilion Clinic's Continuing Medical Education (CME) Program is accredited by the Southern States CME Collaborative (SSCC) to provide ***AMA PRA Category 1 Credit™*** for physicians. This accreditation means we follow national standards designed to ensure that continuing education is fair, unbiased, and focused on improving patient care.

Why this matters to you as faculty
As a faculty member within an academic health system, your role in education directly impacts the quality and integrity of learning for your peers. Maintaining independence from outside influence helps ensure that clinical decisions, and the education that supports them, are based on the best available evidence and always prioritize patient care. Simply put, this process protects both you and your learners.

Healthcare professionals are trusted to put patients first, make informed recommendations, and uphold high ethical standards. While collaboration with industry can support innovation and improve care, it's important that educational activities remain free from bias. That's where proper disclosure of financial relationships comes in.

What you need to know about the COI form
To support transparency, all faculty involved in accredited CME activities must complete the Identification, Mitigation, and Disclosure of Financial Relationships – Conflict of Interest (COI) form. This helps us identify and manage any potential conflicts of interest before an educational activity takes place.
Here's a quick guide:

- **If your content is non-clinical** (for example, education not related to patient care decisions), select this option in **Section 1**.

☐ My lecture is non-clinical (e.g. leadership, communication, mindfulness, etc.) and will not involve any ineligible company whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products or services used by or on patients.
If you checked this box, please proceed to section 4

You will then move directly to **Section 4** to confirm copyright permissions and acknowledge your responsibility to disclose any relevant financial relationships….**and that's it!**

- **If your content is clinical** (related to patient care, treatments, or clinical decision-making), and you have no financial relationships with ineligible companies, you will complete **Section 2 and Section 4** to ensure all relevant relationships are properly reviewed, mitigated, and disclosed (see below).
- **If your content is clinical (related to patient care, treatments, or clinical decision-making), you must complete Section 2, Section 3, and Section 4 to ensure all relevant relationships are properly reviewed, mitigated, and disclosed (see below).**

SECTION 2

☐ In the past 24 months I **have had financial** relationships with ineligible companies. **(Complete SECTION 3 & 4)**

Is It This One ↑ or Is It This One ↓

☐ In the past 24 months I **have not had ANY** financial relationships with any ineligible companies. **(Complete SECTION 4)**

Note: When speakers report no financial relationships with any ineligible companies, that too must be disclosed.

SECTION 3

Please disclose all financial relationships that you have had in the past 24 months with ineligible companies (see definition below). For each financial relationship, enter the name of the ineligible company and the nature of the financial relationship(s). There is no minimum financial threshold, we ask that you disclose all financial relationships, regardless of the amount, with ineligible companies. You should disclose all financial relationships regardless of the potential relevance of

Enter the Name of Ineligible Company An ineligible company is any entity whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. For specific examples of ineligible companies visit accme.org/standards.	**Enter the Nature of Financial Relationship** Examples of financial relationships include employee, research, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, executive role, and ownership interest. Individual stocks and stock options should be disclosed; diversified mutual funds do not need to be disclosed. Research 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.	**Has the Relationship Ended?** If the financial relationship **existed** during the last 24 months, **but has** now **ended, please check the box** in this column. This will help the education staff determine if any mitigation steps need to be taken. ↑ **READ**
Example: ABC Company	Consultant	☒
ABC Pharmaceuticals	Speaker's Bureau	☐

SECTION 4

COPYRIGHT PERMISSION & FINANCIAL RELATIONSHIPS

☐ I grant permission to reproduce and distribute my materials (slides & audio). If not my own material, I have secured the author's permission.
☐ I do not grant permission to reproduce and distribute my materials (slides & audio).
****
☐ I understand it is my responsibility to update my ineligible financial relationships as they occur throughout the year, between signed disclosure forms.
☐ I attest that the above information is correct as of this date of submission **Signature** _____ **Date** _____

Before any activity, learners must be informed of relevant financial relationships so they can engage with the information presented with full transparency.

Why compliance is important

Accurate completion of the COI form is a key step in maintaining accreditation and ensuring high-quality, trustworthy education. It also helps protect the integrity of your work and reinforces the trust placed in you as an educator.

We hope this overview makes the process clearer and helps you feel confident the next time you complete a COI form.

References:

1. ACCME® Standards for Integrity and Independence in Accredited Continuing Education. https://accme.org/news/compliance-check-non-clinical-education-and-standard-3/

Office of Continuing Professional Development

Professional Development

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