



## DISCLOSURE OF FINANCIAL RELATIONSHIPS

**Instructions for completing this form. Please read the definitions and interpretations on Page 1 and complete Pages 2 and 3.**

Medical Learning Institute, Inc. (MLI) is committed to providing high quality accredited continuing education (CE) to healthcare professionals, as individuals and teams, with a protected space to learn, teach, and engage in scientific discourse free from influence from ineligible companies (formerly known as commercial interests) that may have an incentive to insert commercial bias into education. To that end, MLI abides by the *Standards for Integrity and Independence in Accredited Continuing Education* that is applicable to accredited CE across the health professions and are designed to:

- Ensure that accredited CE serves the needs of the patients and the public
- Present learners with only accurate, balanced, scientifically justified recommendations.
- Assure healthcare professionals and teams that they can trust accredited continuing education to help them deliver safe, effective, cost-effective, compassionate care that is based on best practice and evidence.
- Create a clear, unbridgeable separation between accredited continuing education and marketing and sales.

In accordance with guidelines set forth by Joint Accreditation for Interprofessional Continuing Education, including but not limited to, the Accreditation Council for Continuing Medical Education (ACCME), Accreditation Council for Pharmacy Education (ACPE), and the American Nursing Credentialing Center (ANCC), Medical Learning Institute, Inc (MLI) has implemented a process whereby all speakers/faculty/presenters, authors, planners, content reviewers and others who have the potential to affect the content of accredited CE are required to disclose for themselves all financial relationships with ineligible companies. Financial relationships, or other financial benefits create a real, or apparent, conflict of interest which must be identified and mitigated prior to the commencement of the CE activity.

The information listed on this form will be used to assess and mitigate any potential conflict of interest you may have and will be disclosed to the audience of the CE activity. Any individual who refuses to disclose will be disqualified from participating in the CE activity.

### A. Definitions and Interpretations

**Ineligible Company:** Any entity whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients. Ineligible companies are defined as:

- Biomedical start-ups that have begun a regulatory approval process
- Compounding pharmacies that manufacture proprietary products
- Device manufacturers or distributors
- Diagnostic labs that sell proprietary products
- Growers, distributors, manufacturers or sellers of medical foods and dietary supplements
- Manufacturers of health-related wearable products
- Pharmaceutical companies or distributors; pharmacy benefit managers
- Reagent manufacturers or sellers

The following are NOT considered ineligible companies, although they may provide clinical service directly to patients:

- Ambulatory procedure centers
- Blood banks
- Diagnostic labs that do not sell proprietary products
- Electronic health records companies
- Government or military agencies
- Group medical practices
- Health law firms
- Health profession membership organizations
- Hospitals or healthcare delivery systems
- Infusion centers
- Insurance or managed care companies
- Nursing homes
- Pharmacies that do not manufacture proprietary compounds
- Publishing or education companies
- Rehabilitation centers
- Schools of medicine or health science universities
- Software or game developers

**Commercial Support:** Financial, or in-kind, contributions given by ineligible companies, which is used to pay all or part of the costs of an accredited CE activity.

**Financial relationships** include employee or executive role or an owner (of a pharmaceutical or medical device manufacturer), researcher, consultant, advisor, speaker, independent contractor (including contracted research), royalties or patent beneficiary, individual stocks and stock options should be disclosed, but diversified mutual funds do not need to be disclosed. Research funding from companies should be disclosed by the principal or named investigator even if that individual's institution receives the research grant and manages the funds.

### Owners and Employees of Ineligible Companies

The *owners* and *employees* of ineligible companies are considered to have unresolvable financial relationships and will be excluded from participating as planners or faculty and cannot be allowed to influence or control any aspect of the planning, delivery, or evaluation of accredited CE, except in limited circumstances.

**Owners** are defined as individuals who have an ownership interest in a company, except for stockholders of publicly traded companies, or holders of shares through a pension or mutual fund.

**Employees** are defined as individuals hired to work for another person or business (the employer) for compensation and who are subject to the employer's direction as to the details of how to perform the job. There are three exceptions to this exclusion—employees of ineligible companies can participate as planners or faculty in these specific situations:

- a. When the content of the CE activity is not related to the business lines or products of their employer/company.
- b. When the content of the CE activity is limited to basic science research, such as pre-clinical research and drug discovery, or the methodologies of research, and they do not make care recommendations.
- c. When they are participating as technicians to teach the safe and proper use of medical devices, and do not recommend whether or when a device is used.

### B. Intent to Discuss Off-Label Use of a Product/Device

Medical Learning Institute, Inc. requires that the learners, in all of its certified activities, are informed if there is any discussion regarding off-label use of a product/device. If you will be speaking on an off-label use of a product or device, you will discuss that the use or indication in question is not currently approved by the FDA. In the event that you are asked a question during or after your presentation on the off-label use of a product or device, you must disclose at that time that you are speaking off-label.



## DISCLOSURE OF FINANCIAL RELATIONSHIPS

1. Please disclose all financial relationships that you have had in the past **24 months** with ineligible company(ies); only disclose your own financial relationship; NOT those of your spouse or life partner.
2. There is no minimum threshold; you must disclose **ALL** financial relationships, regardless of the amount and your view of the relevance to the accredited education.
3. Select the nature of the financial relationship(s) and list the name(s) of the ineligible company(ies).

<b>Name:</b>	Susan H Yarbrough	<b>Credentials:</b>	FACEHP CHCP
<b>Role:</b>	<input type="checkbox"/> Speaker/Faculty/Author/ Presenter/Moderator/Panelist	<input checked="" type="checkbox"/> Planner (Planning Committee, Chair/ Course Director, CE Staff)	<input checked="" type="checkbox"/> Content Reviewer

Please select one option only:

- In the past **24 months**, I **DO NOT HAVE** any financial relationships with ineligible companies as defined by the ACCME.
- In the past **24 months**, I **DO HAVE** financial relationships with ineligible companies as defined by the ACCME, and they are listed below.

Role/Financial Relationship(s)	Ineligible Company(ies)	If relationship existed in the last 24 months but has now ended, please list below and use the following format: AbbVie (ended February 2022)
Consultant/Advisor	Click or tap here to enter text.	Click or tap here to enter text.
Speaker/Member of a Speaker's Bureau	Click or tap here to enter text.	Click or tap here to enter text.
Research funding (by principal or named investigator even if your institution receives the grant and manages the funds)	Click or tap here to enter text.	Click or tap here to enter text.
Contracted researcher	Click or tap here to enter text.	Click or tap here to enter text.
Royalties	Click or tap here to enter text.	Click or tap here to enter text.
Patent beneficiary	Click or tap here to enter text.	Click or tap here to enter text.
*Stock options in the following ineligible company(ies)	Click or tap here to enter text.	Click or tap here to enter text.
*Own stock in the following privately owned ineligible company(ies)	Click or tap here to enter text.	Click or tap here to enter text.
*Own stock in the following publicly traded ineligible company(ies)	Click or tap here to enter text.	Click or tap here to enter text.
*Own bonds from the following ineligible company(ies)	Click or tap here to enter text.	Click or tap here to enter text.
Ownership interest other than stock options, stocks, or bonds	Click or tap here to enter text.	Click or tap here to enter text.
Monetary compensation for an executive role with the following ineligible company(ies):	Click or tap here to enter text.	Click or tap here to enter text.
Employee of the following ineligible company(ies):	Click or tap here to enter text.	Click or tap here to enter text.
Other (please specify):	Click or tap here to enter text.	Click or tap here to enter text.

\*Diversified mutual funds do not need to be disclosed

Revised: August 31, 2021; March 15, 2021; Jan 03, 2023; Nov 14, 2023; Jan 12, 2024



## AGREEMENT

Although accredited CE is an appropriate place to discuss, debate, and explore new and evolving topics, these areas need to be clearly identified as such within the program and individual presentations. It is the responsibility of accredited providers to facilitate engagement with these topics without advocating for, or promoting, practices that are not, or not yet, adequately on current science, evidence and clinical reasoning. To ensure the quality of our CE activities, we ask that you **attest and sign below** to confirm your agreement to abide by the Policies of the Joint Accreditation for Interprofessional Continuing Education, Accreditation Council for CME (ACCME), Accreditation Council for Pharmacy Education (ACPE), American Nurses Credentialing Center (ANCC), within the spirit of the PhRMA Code, the OIG, FDA Guidance, and Medical Learning Institute, Inc. (MLI).

- I have disclosed all financial relationships and understand that this information will be disclosed to learners. Should my disclosure information change after this submission, I will notify MLI.
- I agree to comply with the following requirements for content validation:

*All recommendations for patient care in accredited CE will be based on current science, evidence, and clinical reasoning, while giving a fair and balanced view of diagnostic and therapeutic options. All scientific research referred to, reported, or used in accredited CE in support or justification of a patient care recommendation will conform to the generally accepted standards of experimental design, data collection, analysis, and interpretation. Accredited CE should not advocate for unscientific approaches to diagnosis or therapy or promote recommendations, treatment, or manners of practicing healthcare that are determined to have risks or dangers that outweigh the benefits or are known to be ineffective in the treatment of patients.*

- I agree to disclose any unlabeled/unapproved uses of drugs or products referenced or discussed in the presentation/materials.
- In the planning/discussion of specific healthcare products or services, I agree to use scientific or generic names in referring to products in activity materials. Should it be necessary to use a trade name, I will use the trade names of all similar products or those within a class. All materials will be free of commercial identification such as company name or logo.
- I understand that this activity will be peer reviewed prior to the CE activity occurring (or being released) for fair balance and to validate content.
- I agree not to receive any direct remuneration or gifts directly from any ineligible company(ies) or their agent(s), nor will I allow direct input from any ineligible company(ies) regarding my participation in this CE activity. I understand that all payments and reimbursements must be made by the accredited provider or authorized educational partner.
- I agree to comply with patient confidentiality requirements as outlined in the Health Insurance Portability and Accountability Act (HIPAA).
- I ensure that use and reproduction of the materials or information used in this CE activity will not violate any third party's copyrights or other property rights. To the extent that copyrighted or trade secret materials are used, reproduced, or displayed, I have obtained written permission to use, reproduce, and distribute such materials from the copyright owner. (Please note that the author of an article is not necessarily the copyright holder of the article.)
- I agree to allow any handout materials/slide set to be distributed electronically to program participants in a pdf format. Distribution may include email, flash drive, and/or download from a website or mobile app.

I attest that the above information is correct as of this date of submission.

Susan H Yarbrough CHCP FACEhp

Type Name

3/19/2024

Date