

# **Documentation of the Resolution of COI for a CE Activity**

#### Introduction

The documentation of the mechanisms used to resolve *relevant* conflicts of interest (COI) is a critical requirement of all accrediting agencies. **Planners and Reviewers** must have their COI resolved BEFORE they begin their work as planners or reviewers. Therefore, obtaining financial relationships immediately upon inviting planners is important. Relevant **Faculty** COI should be reviewed in two stages: (1) initially upon receipt of their disclosure form to rule out their participation if COI is significant or irresolvable, and (2) after their presentations are prepared and before the date of the activity so that content can be reviewed and edited if necessary.

#### PART 1: PLANNER AND REVIEWER RESOLUTION OF COI

Name of Planner #1:		] 🗌 No Relevant COI Reported			
Conflict A:	Type of COI How was this CO	OI resolved? (check one or more choices below)			
	Another planner participated in the planning process to ensure fair balance				
	Planner with COI recused him/herself from planning content rele	evant to the reported conflict			
	Reported COI is not related to activity content				
Conflict B:	Type of COI How was this CO	OI resolved? (check one or more choices below)			
	Another planner participated in the planning process to ensure fair balance				
	Planner with COI recused him/herself from planning content rele	evant to the reported conflict			
	Reported COI is not related to activity content				
Conflict C:	Type of COI How was this CO	OI resolved? (check one or more choices below)			
	Another planner participated in the planning process to ensure	fair balance			
	Planner with COI recused him/herself from planning content rele	evant to the reported conflict			
	Reported COI is not related to activity content				
Name of Planner #2:		] 🗌 No Relevant COI Reported			
Conflict A:	Type of COI				
	Another planner participated in the planning process to ensure	fair balance			
	Planner with COI recused him/herself from planning content rele	evant to the reported conflict			
	Reported COI is not related to activity content				
Conflict B:	Type of COI				
	Another planner participated in the planning process to ensure f	fair balance			
	Planner with COI recused him/herself from planning content rele	evant to the reported conflict			
	Reported COI is not related to activity content				
Conflict C:	Type of COI				
	Another planner participated in the planning process to ensure	fair balance			
	Planner with COI recused him/herself from planning content rele	evant to the reported conflict			
	Reported COI is not related to activity content				

## PLANNER AND REVIEWER RESOLUTION OF COI (cont'd)

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Name of Planner #3:		No Relevant COI Reported
Conflict A:	Type of COI How was this C	OI resolved? (check one or more choices below)
	Another planner participated in the planning process to ensure	fair balance
	Planner with COI recused him/herself from planning content re	levant to the reported conflict
	Reported COI is not related to activity content	
Conflict B:	Type of COI How was this C	OI resolved? (check one or more choices below)
	Another planner participated in the planning process to ensure	fair balance
	Planner with COI recused him/herself from planning content re	levant to the reported conflict
	Reported COI is not related to activity content	
Conflict C:	Type of COI How was this C	COI resolved? (check one or more choices below)
	Another planner participated in the planning process to ensure	fair balance
	Planner with COI recused him/herself from planning content re	levant to the reported conflict
	Reported COI is not related to activity content	
Name of Planner #4:		No Relevant COI Reported
Conflict A:	Type of COI How was this C	OI resolved? (check one or more choices below)
	Another planner participated in the planning process to ensure	fair balance
	Planner with COI recused him/herself from planning content re	levant to the reported conflict
	Reported COI is not related to activity content	
Conflict B:	Type of COI How was this C	OI resolved? (check one or more choices below)
	Another planner participated in the planning process to ensure	fair balance
	Planner with COI recused him/herself from planning content re	levant to the reported conflict
	Reported COI is not related to activity content	
Conflict C:	Type of COI	
	Another planner participated in the planning process to ensure	fair balance
	Planner with COI recused him/herself from planning content re	levant to the reported conflict
	Reported COI is not related to activity content	
Name of Reviewer 1:		No Relevant COI Reported
L	Type of COI How was this CO	┘ I resolved? (check one or more choices below)
	Another planner participated in the planning process to ensure fa	ir balance
	Planner with COI recused him/herself from planning content relevance	
	Reported COI is not related to activity content	
Name of Reviewer 2:		No Relevant COI Reported
Additional Notes:		

### PART 2: FACULTY / TEACHER RESOLUTION OF COI

Name of Faculty #1:			No Relevant	COI Report	ed
Conflict A:	Type of COI	How was this COI re	esolved? (check one or m	ore choices k	pelow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for pa</li> <li>Faculty needs to make revisions to content ar</li> </ul>	tient care on peer revi	ewed data	Was COI re O Yes	esolved?
Conflict B:	Type of COI Faculty will refrain from making recommendation Faculty will make all recommendations for para Faculty needs to make revisions to content ar	ations on topics in whic tient care on peer revi	ewed data	ore choices b Was COI re O Yes	
Conflict C:	Type of COI         Faculty will refrain from making recommendation         Faculty will make all recommendations for particular         Faculty needs to make revisions to content and	ations on topics in whic tient care on peer revio	ewed data	ore choices b Was COI re O Yes	
Name of Faculty #2:			No Relevant	COI Report	ed
Conflict A:	Type of COI         Faculty will refrain from making recommendation         Faculty will make all recommendations for particular         Faculty needs to make revisions to content and	ations on topics in whic tient care on peer revio	ewed data	ore choices b Was COI re O Yes	
Conflict B:	Type of COI         Faculty will refrain from making recommendation         Faculty will make all recommendations for particular         Faculty needs to make revisions to content and	ations on topics in whic tient care on peer revio	ewed data	ore choices b Was COI re O Yes	
Conflict C:	Type of COI Faculty will refrain from making recommendation Faculty will make all recommendations for pa Faculty needs to make revisions to content ar	ations on topics in whic tient care on peer revio	ewed data	ore choices b Was COI re O Yes	

Additional Notes:	

## Faculty/Teach Resolution of COI (cont'd)

Name of Faculty #3:			No Relevant	COI Reporte	ed
Conflict A:	Type of COI	How was this COI re	esolved? (check one or me	ore choices k	elow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for particular parti</li></ul>	atient care on peer revie	ewed data	Was COI re O Yes	esolved?
Conflict B:	Type of COI	How was this COI re	esolved? (check one or me	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for particular parti</li></ul>	atient care on peer revie	ewed data	Was COI re O Yes	esolved?
Conflict C:	Type of COI	How was this COI re	esolved? (check one or me	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for particular parti</li></ul>	atient care on peer revie	ewed data	Was COI re O Yes	esolved?
Name of Faculty #4:			No Relevant	COI Reporte	∍d
Conflict A:	Type of COI Faculty will refrain from making recommendations Faculty will make all recommendations for pa Faculty needs to make revisions to content and	ations on topics in whic atient care on peer revie	ewed data	ore choices b Was COI re O Yes	
Conflict B:	Type of COI Faculty will refrain from making recommendations Faculty will make all recommendations for pa Faculty needs to make revisions to content and	ations on topics in whic atient care on peer revie	ewed data	ore choices b Was COI re O Yes	
Conflict C:	Type of COI		esolved? (check one or mo	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for pa</li> <li>Faculty needs to make revisions to content and</li> </ul>	atient care on peer revie	ewed data	Was COI re	esolved?

Additional Notes:	

## Faculty/Teach Resolution of COI (cont'd)

Name of Faculty #5:			No Relevant	COI Reporte	ed
Conflict A:	Type of COI	How was this COI re	esolved? (check one or mo	ore choices b	elow)
	Faculty will refrain from making recommendati Faculty will make all recommendations for pati	ent care on peer revi	ewed data	Was COI re	solved?
Conflict B:	Faculty needs to make revisions to content and Type of COI	How was this COI re	esolved? (check one or mo	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendati</li> <li>Faculty will make all recommendations for pati</li> <li>Faculty needs to make revisions to content and</li> </ul>	ent care on peer revi	ewed data	Was COI re	solved?
Conflict C:	Type of COI		esolved? (check one or mo	ore choices b	elow)
	<ul> <li>Faculty will make all recommendations for pati</li> <li>Faculty needs to make revisions to content and</li> </ul>	ent care on peer revi	ewed data	Was COI re	solved?
Name of Faculty #6:			No Relevant	COI Reporte	ed
Conflict A:	Type of COI Faculty will refrain from making recommendati Faculty will make all recommendations for pati Faculty needs to make revisions to content and	ions on topics in whic ent care on peer revie	ewed data	Was COI re	
Conflict B:	Type of COI Faculty will refrain from making recommendati Faculty will make all recommendations for pati Faculty needs to make revisions to content and	ions on topics in whic ent care on peer revi	ewed data	Was COI re	
Conflict C:	Type of COI Faculty will refrain from making recommendati Faculty will make all recommendations for pati Faculty needs to make revisions to content and	ions on topics in whic ent care on peer revi	ewed data	Was COI re	

Additional Notes:	

## Faculty/Teach Resolution of COI (cont'd)

Name of Faculty #7:			No Relevant	COI Reporte	ed
Conflict A:	Type of COI	How was this COI re	esolved? (check one or mo	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendations</li> <li>Faculty will make all recommendations for particular part</li></ul>	atient care on peer revi	ewed data	Was COI re	esolved?
Conflict B:	Type of COI	How was this COI re	esolved? (check one or mo	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for particular parti</li></ul>	atient care on peer revi	ewed data	Was COI re O Yes	solved?
Conflict C:	Type of COI	How was this COI re	esolved? (check one or mo	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for particular parti</li></ul>	atient care on peer revi	ewed data	Was COI re O Yes	esolved?
Name of Faculty #8:			No Relevant	COI Reporte	ed
Conflict A:	Type of COI Faculty will refrain from making recommendation Faculty will make all recommendations for pa Faculty needs to make revisions to content a	ations on topics in whic atient care on peer revie	ewed data	ore choices b Was COI re OYes	
Conflict B:	Type of COI Faculty will refrain from making recommendations Faculty will make all recommendations for pa Faculty needs to make revisions to content a	ations on topics in whic atient care on peer revie	ewed data	ore choices b Was COI re O Yes	
Conflict C:	Type of COI	How was this COI re	esolved? (check one or mo	ore choices b	elow)
	<ul> <li>Faculty will refrain from making recommendation</li> <li>Faculty will make all recommendations for particular parti</li></ul>	atient care on peer revi	ewed data	Was COI re	esolved?

Additional Notes:	