Program Planner/Instructional Personnel Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association’s Continuing Education Board’s Requirements, WVSHA requires program planners and instructional personnel to disclose information regarding any relevant financial and non-financial relationships related to course content prior to and during course planning.

Based on the information provided, WVSHA will engage the program planner/instructional personnel in a guided interview process which seeks to understand how the relevant financial or nonfinancial relationship may influence the content of the course.

Program Planner/Instructional Personnel’s Name: ________________________________

Course Title: HIPAA REQUIREMENTS

To comply with the Health Insurance Portability and Accountability Act (HIPAA), we ask that all program planners and instructional personnel insure the privacy of their patients/clients by refraining from using names, photographs, or other patient/client identifiers in course materials without the patient’s/client’s knowledge and written authorization.

I am in compliance with these policies: __________(INITIAL HERE)

Relevant financial relationships are those relationships in which the individual benefits by receiving a salary, royalty, intellectual property rights, gift, speaking fee, consulting fee, honoraria, ownership interest (e.g., stocks, stock options, or other ownership interest, excluding diversified mutual funds), or other financial benefit. Financial relationships can also include “contracted research” where the institution gets the grant and manages the funds and the individual is the principal or named investigator on the grant.

Do you have relevant financial relationships to disclose? No Yes, if yes complete page 2

Relevant non-financial relationships are those relationships that might bias an individual including any personal, professional, political, institutional, religious or other relationship. May also include personal interest or cultural bias.

Do you have relevant non-financial relationships to disclose? No Yes, if yes complete page 3
Financial Relationship Disclosure Form

Copy this page as many times as you need to complete information regarding each of your relevant financial relationships. Program Planners/Instructional personnel have a relevant financial relationship if that relationship could influence the information presented in the course and could be perceived as a conflict of interest by learners.

Planner/Presenter name: _________________________________________________________
Financial relationship with (name of Company/Organization): __________________________
Date form completed: __________________

What was received? (Check all that apply)
___ Salary
___ Consulting fee
___ Intellectual property rights
___ Speaking fee
___ Royalty
___ Honoraria
___ Hold patent on equipment
___ In kind
___ Grants
___ Gift
___ Ownership interest (e.g., stocks, stock options or other ownership interest excluding diversified mutual funds)
___ Other financial benefit (please describe):

For what role? (Check all that apply)
___ Employment
___ Management position
___ Teaching and speaking
___ Board membership
___ Ownership
___ Consulting
___ Membership on advisory committee or review panels
___ Independent contractor (including contracted research)
___ Other activities (please describe):
Non-Financial Relationship Disclosure Form

Copy this page as many times as you need to complete information regarding each of your relevant non-financial relationships. Program Planners/instructional personnel have a relevant non-financial relationship if that relationship could influence the information presented in the course and could be perceived as a conflict of interest by learners.

Planner/Presenter name: _____________________________________________

Non-financial relationship with (name of Company/Organization/Institution):
______________________________________________________________

Date form completed: ________________________________

What is the nature of the non-financial relationship? (Complete all that apply)

Personal, please describe:

Professional, please describe:

Political, please describe:

Institutional, please describe:

Religious, please describe:

Personal interest, please describe:

Bias, please describe:

Other relationship, please describe:

For what role?

Volunteer employment
Volunteer teaching and speaking
Board membership
Volunteer consulting
Volunteer membership on advisory committee or review panels
Other volunteer activities (please describe):