

## Program Planner/Instructional Personnel Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, Endo Education 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, Endo Education 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: Julie L. Locher

Course Title: The burden of nutritional complications among dysphagic patients

### 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: JLL (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

I attest that the information in this disclosure is accurate at the time of completion.

Signature Julie L. Locher Date 11.20.13

## 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: Julie L. Locher

Financial relationship with (name of Company/Organization): Nestle

Date form completed: \_\_\_\_\_

### What was received? (Check all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Salary   | <input type="checkbox"/> In kind   |
| <input type="checkbox"/> Consulting fee                                   | <input type="checkbox"/> Grants  |
| <input type="checkbox"/> Intellectual property rights                     | <input type="checkbox"/> Gift  |
| <input checked="" type="checkbox"/> Speaking fee                          | <input type="checkbox"/> Ownership interest (e.g., stocks, stock options or other ownership interest excluding diversified mutual funds) |
| <input type="checkbox"/> Royalty  |  |
| <input checked="" type="checkbox"/> Honoraria                             |  |
| <input type="checkbox"/> Hold patent on equipment                         |  |
| <input type="checkbox"/> 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): \_\_\_\_\_