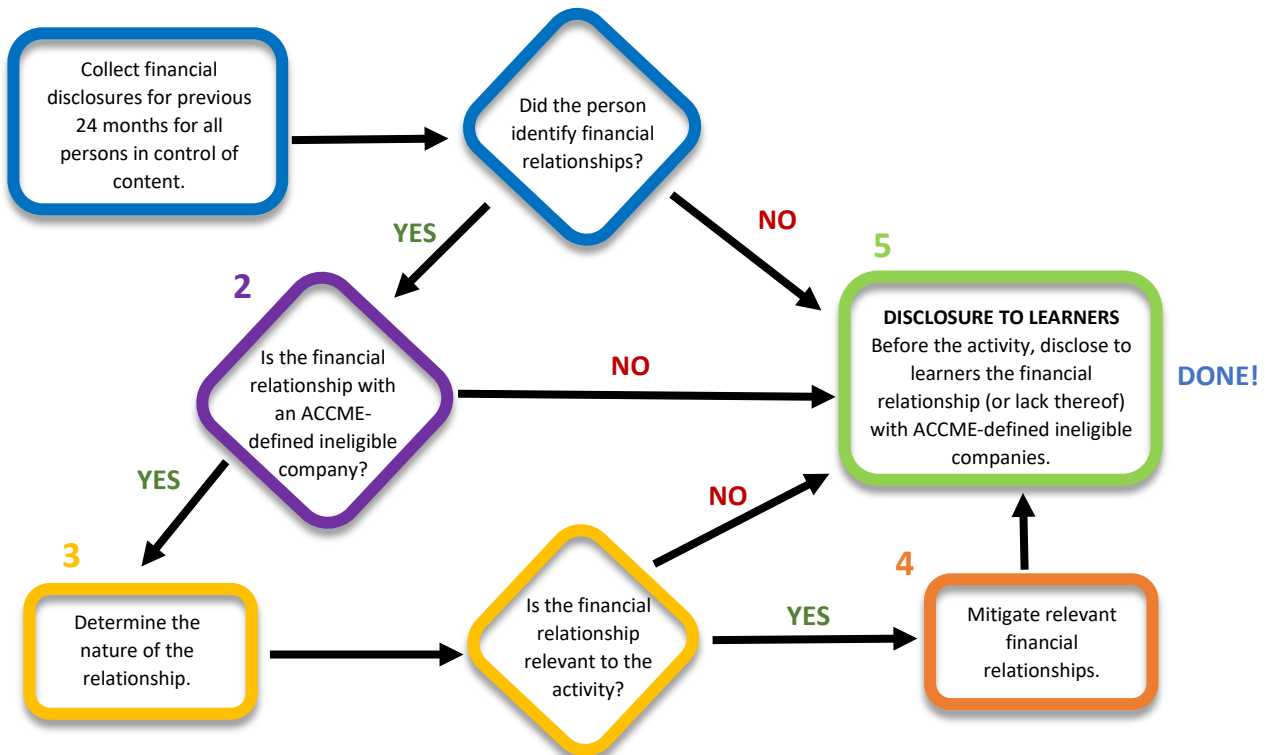


## Flowchart for Meeting the Expectations of Standard 3: Identify, Mitigate, and Disclose Relevant Financial Relationships

Before you begin planning your education, collect information from ALL planners, faculty, steering committee members and others who would be in positions to control content.

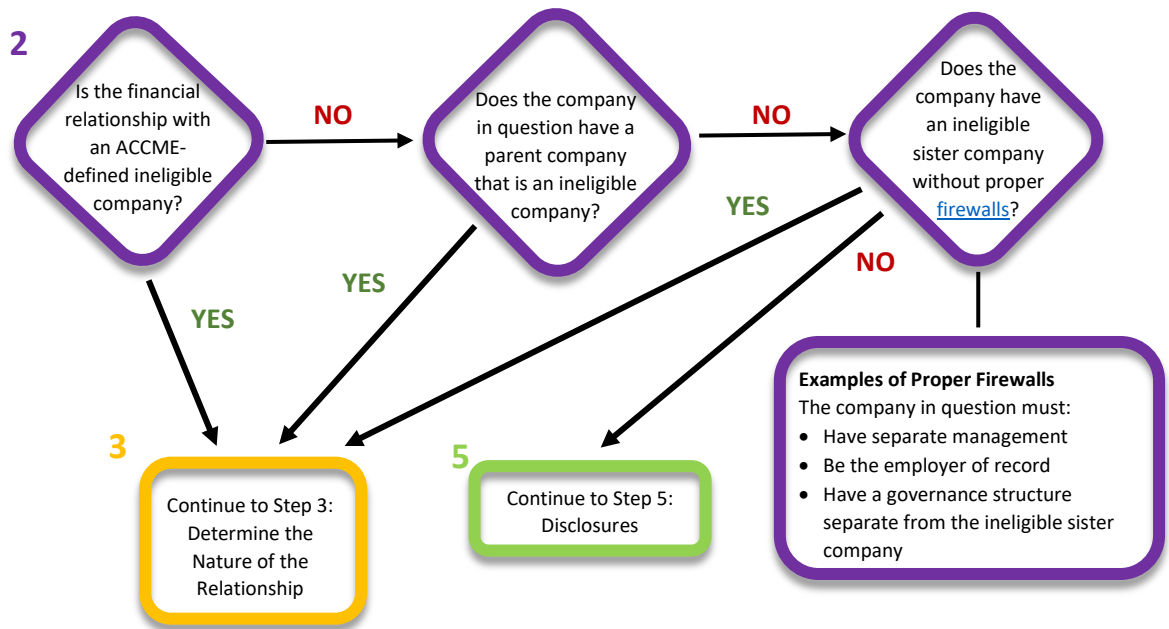
1



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*Continue to the next pages for more information on completing  
Steps 2, 3, 4, and 5.*

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**Examples of Proper Firewalls**  
 The company in question must:

- Have separate management
- Be the employer of record
- Have a governance structure separate from the ineligible sister company

**Eligible**

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

**Ineligible**

- Advertising marketing or communication firms whose clients are ineligible companies
- Bio-medical startups that have begun a governmental regulatory approval process
- Compounding pharmacies that manufacture proprietary compounds
- Device manufacturers or distributors
- Diagnostic labs that sell proprietary products
- Growers, distributors, manufacturers, or sellers of medical foods and dietary supplements
- Manufacturers or health-related wearable products
- Pharmaceutical companies or distributors
- Pharmacy benefit managers
- Reagent manufacturers or sellers
- A company or organization owned by any of the above

