

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Michelle L. Arnold, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

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### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
University of South Florida	I am employed by the University of South Florida where I receive a salary.
NIDCD and NIA	I am supported by research grants from the NIDCD and the NIA.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

## Sample Course Planner/Instructor Relationship Disclosure Form

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Signature Michelle L. Arnold, PhD Date 12/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

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Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Shilpi Banerjee, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

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### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Skafoad Consulting; Western University	I am employed by Skafoad Consulting. I am a paid consultant to Western University (formerly University of Western Ontario).

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Shilpi Banerjee, PhD Date 10/12/23



### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Chelsea Marie Blankenship, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

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### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Cincinnati Children's Hospital Medical Center (CCHMC)	I am employed by CCHMC where I receive a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Chelsea Marie Blankenship, PhD Date 10/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
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### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
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  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:



## Course Planner/Instructor Relationship Disclosure Form

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Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: William J. Bologna, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

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### *Financial Relationships*

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Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Towson University	I am employed by Towson University where I receive a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature William J. Bologna, PhD Date 10/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
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### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

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- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
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**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

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- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

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**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Sriram Boothalingam, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

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Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Macquarie University; National Acoustic Laboratories	I am employed by Macquarie University and National Acoustic Laboratories where I receive a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Sriram Boothalingam, PhD Date 10/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

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- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)



- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Adam K. Bosen, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Boys Town National Research Hospital	I am employed by Boys Town National Research Hospital where I received a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Adam K. Bosen, PhD Date 10/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Kristy Kay Deiters, AuD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*



## Sample Course Planner/Instructor Relationship Disclosure Form

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### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Stephenson & Stephenson Research & Consulting	I am employed by Stephenson & Stephenson Research & Consulting where I receive an hourly rate of pay.
Edare/DoD; NIOSH	Assigned tasks that arise from a grant from Edare/DoD and a contract with NIOSH.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

## Sample Course Planner/Instructor Relationship Disclosure Form

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I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Kristy Kay Deiters, AuD Date 10/11/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: David Fabry, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Starkey	I am employed by Starkey where I receive a salary.
Envoy Medical	Cochlear implant Advisory Board, Envoy Medical

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

## Sample Course Planner/Instructor Relationship Disclosure Form

3

Signature David Fabry, PhD Date 12/13/23



### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Matthew Fitzgerald, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Stanford University	I am employed by Stanford University, where I receive a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Matthew Fitzgerald, PhD Date 10/11/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:



## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Jason Galster, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Advanced Bionics, LLC; Sonova	Employment
Sonova	Stock/Equity

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Jason Galster, PhD Date 10/13/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Angela Garinis, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Oregon Health & Science University; Horizon Therapeutics; Oregon Hearing Solutions	Employment
Cystic Fibrosis Foundation; NIH-NIDCD	Research Support/Grants

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

## Sample Course Planner/Instructor Relationship Disclosure Form

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Signature Angela Garinis, PhD Date 10/11/23



### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Tina M. Grieco-Calub, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Rush University	I am employed by Rush University where I receive a salary.
NIH	I receive funding from NIH (NIDCD, NICHD)
Journal of Speech Language Hearing Research and NIH	I receive a stipend as an editor for the Journal of Speech Language Hearing Research. I also receive a stipend from the NIH for grant reviews.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

## Sample Course Planner/Instructor Relationship Disclosure Form

3

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Tina M. Grieco-Calub, PhD Date 12/11/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.



**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: O'neil Guthrie, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Northern Arizona University	I am employed by Arizona State University where I receive a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature O’neil Guthrie, PhD Date 10/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Rachael Frush Holt, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Ohio State University	I am employed by Ohio State University.
NIH; NSF	I have an NIH Grant (R01DC014956) and an NSF Grant (BCS - 1941662).

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Rachael Frush Holt, PhD Date 10/12/23



### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Lisa L. Hunter, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Communication Sciences Research Center, Cincinnati Children's Hospital Medical Center	I am employed by Communication Sciences Research Center, Cincinnati Children's Hospital Medical Center, USA where I receive a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Lisa L. Hunter, PhD Date 11/15/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:



## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Jungmee Lee, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
University of South Florida	I am employed by University of South Florida where I receive a salary.
NIDCD	Grant funding.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

## Sample Course Planner/Instructor Relationship Disclosure Form

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Signature Jungmee Lee, PhD Date 11/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Frank Lin

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Apple Inc	Consultant to Apple Inc
Sharper Sense and MyPhysicianPlan	Scientific advisory board for Sharper Sense and MyPhysicianPlan
Cochlear Ltd; Johns Hopkins Bloomberg School of Public Health	Director of a public health research center funded in part by a philanthropic gift from Cochlear Ltd to Johns Hopkins Bloomberg School of Public Health

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)



### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Frank Lin Date 12/14/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Ryan W. McCreery, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Boys Town National Research Hospital	I am employed by Boys Town National Research Hospital where I receive a salary.
NIH/NIDCD	Research Support/Grants

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Ryan W. McCreery, PhD Date 10/11/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.



**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Gabrielle Merchant, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Boys Town National Research Hospital	I am employed by Boys Town National Research Hospital where I receive a salary.
Department of Defense and the National Institutes of Health	Grant funding.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Gabrielle R. Merchant, PhD Date 11/06/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Aaron C. Moberly, MD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Otologic Technologies	I am on the Board of Directors and serve as CMO for Otologic Technologies.
Cochlear Americas; Advanced Bionics	I have received research support in the past from Cochlear Americas and Advanced Bionics.
Otologic Technologies	I have stock in Otologic Technologies.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation



## Sample Course Planner/Instructor Relationship Disclosure Form

3

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Aaron C. Moberly, MD Date 10/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Brian B. Monson, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
University of Illinois	I am employed by University of Illinois where I receive a salary.
I am supported by NIH R01 DC019745 and NIH R21 DC017820.	Research Support/Grants

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Brian B. Monson, PhD Date 10/13/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.



**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Christina M. Roup, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Ohio State University	I am employed by Ohio State University where I receive a salary.
Cochlear Americas	I have a grant from Cochlear Americas.
American Journal of Audiology	I am an editor for the American Journal of Audiology

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

## Sample Course Planner/Instructor Relationship Disclosure Form

3

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Christina M. Roup, PhD Date 10/13/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Jessica Sullivan

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*



## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
Hampton University	I am employed by Hampton University where I receive a salary.

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Jessica Sullivan Date 10/11/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Elizabeth Ann Walker, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

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### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
University of Iowa	I am employed by University of Iowa where I receive a salary.
National Institutes of Health	Research Grant

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)
ASHA; Ear & Hearing	I am on the ASHA Board of Directors and the Ear and Hearing journal board

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Elizabeth Ann Walker, PhD Date 10/12/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.



**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Heather M. Weinreich, MD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
NIH NIDCD	Sub-site PI on grant NIH NIDCD 1R01DC021301-01

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)
Skovlund Medical	I am an unpaid consultant for Skovlund Medical LLC

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Heather M. Weinreich, MD Date 10/13/23

### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
- ☐ has disclosed relationships deemed not relevant to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)

### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships:

## Course Planner/Instructor Relationship Disclosure Form

In compliance with American Speech-Language Hearing Association's Continuing Education Board's Requirements, the **University of Arizona SLHS** requires course planners and instructors to disclose information regarding any relevant financial and nonfinancial relationships related to course content prior to and during course planning.

Based on the information provided, **University of Arizona SLHS** will engage the course planners/instructors in a guided interview process which seeks to understand how relevant financial or nonfinancial relationships may influence the content of the course.

Course planners and instructors will be finalized only after this form has been received and reviewed by **University of Arizona SLHS**. The process used to review, resolve, and disclose relevant relationships is included below.

**Instructions:** *Provide the information requested ensuring that all relevant financial and nonfinancial relationships are disclosed on this form.*

Name: Matthew Winn, PhD

I am serving as (check all that apply):

☒ Course Planner      ☐ Instructional Personnel (i.e., Presenter/Author/Content Creator)

Proposed Course Title: 51<sup>st</sup> Annual Scientific & Technology Conference of the American Auditory Society

### Learning Outcomes

*Instructional personnel: Insert proposed learner outcomes for course (if available)*

### Biography

*Instructional personnel: Insert your biography or resume*

## Sample Course Planner/Instructor Relationship Disclosure Form

2

### Disclosures

All planners and presenters must disclose relevant financial and nonfinancial relationships, or lack thereof, to the Provider during course planning and to learners at the start of the course.

**Presenters need only disclose those relationships that are relevant to and may influence course content and delivery.**

### *Financial Relationships*

Financial relationships may include receiving a salary, royalty, intellectual property rights, gifts, speaking fee, consulting fee, honorarium, ownership interest, or other financial benefit. Financial relationships can also include “contracted research” in which the institution receives the grant, manages the funds, and the individual is the principal or named investigator on the grant.

Do you have financial relationships that are relevant to the proposed course’s content to disclose?

☐ No ☒ Yes

If yes, please describe financial relationships that are relevant to the proposed course’s content.

Name of Company or Organization	Description of Relationship (e.g., salary, royalty, intellectual property rights, etc.)
University of Minnesota	Employment
NIH 2R01DC017114-06; NIH R01DC020303; NSF FAIN 2146885	Research Support/Grants

### *Nonfinancial Relationships*

Nonfinancial relationships may include personal or professional roles, experiences, and background.

Do you have nonfinancial relationships relevant to proposed course’s content to disclose?

☒ No ☐ Yes

If yes, please describe nonfinancial relationships that are relevant to the proposed course’s content.

Name of Company, Organization, Individual, or Other	Description of Relationship (e.g., personal or professional roles, etc.)

### Attestation

I attest that the information in this disclosure is accurate at the time of completion, and I agree to notify **American Auditory Society** of any changes to this information between now and the presentation.

Signature Matthew Winn, PhD Date 10/13/23



### Review of Information Disclosed by Course Planners and Instructional Personnel

**Step 1.** Provider's representative reviews the disclosure form, the learner outcomes, the individual's biography or resume and all other course related materials.

**Step 2.** Provider's representative identifies any questions about the disclosure information.

**Step 3.** Provider's representative contacts the planner or instructional personnel to discuss the disclosure information provided.

**Step 4.** Provider's representative determines if the individual (check one):

- ☐ has financial and/or nonfinancial relationships relevant to the course content and a resolution process is required. (Go to "Resolution of Disclosed Relevant Relationships.")
- ☐ has no relevant financial or nonfinancial relationships to the course content and no resolution process is required. (For instructional personnel, go to "Disclosure to Learners." For course planners, stop.)
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### Resolution of Disclosed Relevant Relationships

Check the methods used to resolve the identified relevant relationship(s) and enhance transparency.

- ☐ Determined that disclosing the relevant relationship(s) to learners was sufficient to minimize potential conflict of interest.
- ☐ Used a peer review process (process by which materials are reviewed by experts in that topic area to ensure the data support the conclusions before they are accepted for presentation or publication). If necessary, instructional personnel will be required to revise content based on recommendations from the peer review.
- ☐ Altered the control over the course content by:
  - ☐ Changing the focus of the content so that it does not relate to the relevant relationship
  - ☐ Changing the content/topic of the individual's educational assignment so that it does not relate to the relevant relationship
  - ☐ Limiting the individual's content to a report without practice recommendations (if individual was funded by a commercial company to perform research, the individual's presentation may be limited to research data and results)

- ☐ Limiting the role of the individual to reporting practice recommendations based on formal structured review of the literature with the inclusion and exclusion criteria stated (evidence-based)
- ☐ Other (please describe)
- ☐ The individual documented the 'best available evidence' to support their recommendations. (e.g., individual provided adequate references)
- ☐ Chose not to select the individual as a planner and/or instructional personnel
- ☐ Other (please describe):

### Disclosure to Learners

**Step 1.** Develop the instructional personnel disclosure statement with information from the disclosure form and discussions with the instructional personnel:

Select the applicable format:

- ☐ Option 1: [Insert instructional personnel name] has no relevant financial or nonfinancial relationships to disclose.
- ☐ Option 2: [Insert instructional personnel name] has the following relevant financial relationships to disclose: [insert name of organization and type of financial relationship] and relevant nonfinancial relationships to disclose: [insert name of organization and type of nonfinancial relationship].
- ☐ Option 3: [Insert instructional personnel name] has the following relevant financial relationship to disclose: [insert name of organization and type of financial relationship] and no relevant nonfinancial relationships to disclose.
- ☐ Option 4: [Insert instructional personnel name] has no relevant financial relationships to disclose and the following relevant nonfinancial relationship to disclose [insert name of organization and type of nonfinancial relationship].

**Step 2.** Send the draft instructional personnel disclosure statement to the instructional personnel for review and approval.

**Step 3.** Finalize and provide instructional personnel disclosure statement to potential registrants prior to the start of the course. Indicate where the statement will be published (check all that apply):

- ☐ Printed brochure ☐ Website ☐ Email blasts ☐ Other Describe:

**Step 4.** Ensure that the agreed upon instructional personnel disclosure statement will be announced (verbally and/or in writing) at the start of the course.

**Step 5.** Contact instructional personnel on or before **[insert date]** to identify any relevant financial and nonfinancial relationships that have developed after course planning and prior to course delivery. Complete the following after contacting the instructional personnel.

- ☐ Instructional personnel disclosure statement unchanged
- ☐ Changes in relevant relationships (describe):
- ☐ Insert revised instructional personnel disclosure statement:
- ☐ Describe the plan for communicating to participants the changes in relevant relationships: