If you received an email stating Your Annual COI Statement is Due, click on the link that is embedded in the email. The link will take you to the eDisclosure login page. If you did not receive an email, you can login to eDisclosure via the following web address: <u>https://eDisclosure.arizona.edu</u>

coi@arizona.edu			
there are problems with how this	message is display	ed, dick bere to	view it in a web bro
uncre are provients with now this	a measage is display	eu, ciick here to	view ic in a web bio
Annual Disclosure Certificat	ion for	: 2021	
		there are problems with how this message is display Annual Disclosure Certification for	Annual Disclosure Certification for 2021

2. From **My Inbox** which is located on the **Dashboard** click on the **Annual Certification** hyperlink.

The University . of Arizona			eĽ	Disclosure				
»	Dashboard		COI					
	Create 👻	My Inbox	My Reviews					🕜 Help
Recently	Viewed	My Inbox						
_		Filter by 🔞	ID	Enter text to search for	٩	+ Add Filter X Clear All		
		ID	Name			Date Created		State Coordinator
		DC00013	118 Annual Dis	closure Certification for	2021	6/24/2021 8:48 AM	6/24/2021 8:48 AM	Draft

3. The **General Information** page displays providing information about the need for disclosing and helpful documents to have on hand when completing your disclosure. Click **Edit Disclosures** to begin the process.



4. Respond to the questions on the Institutional Responsibilities page, adding text when prompted. Please note that if you meet the definition of a UArizona Administrator (click on the help text for the definition), respond Yes to question #2. If you have Outside Employment or an Outside Commitment that you need to disclose, please respond Yes to question #5.

5. \* Is your UArizona FTE 0.50 or greater? • Yes O No <u>Clear</u>

Once you have completed the questions, click **Continue** located in the lower right corner.



5. Certify that you have completed your Conflict of Interest training. Please note that if you have previously certified your Conflict of Interest training in eDisclosure you will not see this page until your training is about to expire. Click **Continue** once you have answered the questions.

E Vandato	~~	You Are Here: 🔐 Annual Disclosura Cartificatio					
nstitutional Responsibilities		Editing: DC00013118	4 Go to forms menu 🖶 Print 👻 😧 Ho				
Training and Education		Annual Certification for	<b>Training and Education Information</b>				
What to Disclose Disclosure Details Mdditional Information Assurance and Certification		This institution requires you to complete a few simple steps in order to be compliant with its policy and federal regulations. The following steps may be completed through the 4Dinclosure system. Complete this disclosure certification training when you begin employment and as required by institutional policy. Disclose are system. Disclose are system. Provide all necessary disclosure information annually. Annual disclosures are in addition to any disclosures within 30 days of new interests being acquired or discovered. If a management plan is required, your agreement to the plan must be documented prior to any of your \$F(s) related funding being released. If a management plan is required, your agreement to the plan must be documented prior to any of your \$F(s) related funding being released. If a management plan is required for all of the relations in the relations. You must respond to all requests for information and/or meetings regarding the institution's responsibility to monitor compliance with the plan. You must respond to all requests for information and/or meetings regarding the institution's responsibility to monitor compliance with the plan. You must respond to all requests for information and/or meetings regarding the institution's responsibility to monitor compliance with plan.					
		f. * I certify that I have completed the "Required of requirements that were presented to me: ● Yes ○ No Clear      2. * Date that you completed your COI training: [442021 m]	onflict of Interest Disclosure Training" and understand the information and				
			Continue				

6. The What to Disclose page displays. Please read the information and respond to the question Are there any outside organizations or companies with which you or a family member have a personal or financial relationship? If your response is No, click Continue on this screen and the next 2 screens, then proceed to step #13 of this instruction to certify your disclosure. A Yes response reveals additional SmartForms required to complete your disclosure. Click Continue.



7. To add an **Organization** (formerly Entity), click on **Add Disclosure**.

E 🗈 Ventetate	✓ You Are Here:  Annual Disclosure Certificatio
Institutional Responsibilities	Editing: DC00013118 Co to forms menu 🖨 Prot 👻 🕑 Holp
Training and Education	Annual Certification for Disclosure Details
What to Disclose	You need to disclose any external company or organization where you or a family member has a financial relationship, personal interest or an Outside Commitment.
Disclosure Details	On this page, you will be required to provide information on each company / external organization with which you have a relationship.
Additional Information	If the relationship has not previously been disclosed, click on the "Add Disclosure' button. If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure to update. If the relationship ended more than 12 months age (e.g. a consulting agreement that is no longer active), click on the "Remove" link to the right of the disclosure.
Assurance and Certification	Add Disclosure
and the second se	1. Disclosures under review: 🚱
	View/Edit Organization is Public Retationships Disclosure Total is Last Remove Type Value Significant? Updated
	There are no items to display
	2. Previously reviewed disclosures: (click 'Modify' to enable editing)
	Modify View Organization Is Public Company Relationships Disclosure Total Is Value Significant? Last Remove
	There are no items to display
	🗘 Exit 🕞 Save Continue 🔿

8. To select an organization, click on the ellipses to search the database of existing organizations and select the organization you would like to disclose. If the organization you wish to disclose is not in the database, enter the name in the text box for question #2 (you will be asked specific questions about the new organization in a subsequent SmartForm). Click **OK**.

Create New Disclosure	
1. Select the external organization this disclosure is for:	
2. If you are unable to find the organization, please enter as text below:	
	OK Cancel

9. The General Information page displays showing the organization that was previously selected. Answer the questions and fill in text boxes when prompted. Please note, if you have Outside Employment or an Outside Commitment with this organization be sure to check the Outside employment or commitment (COC form) button. eDisclosure is designed to display additional pages called SmartForms in response to the boxes that are checked.

3. *	Wha	at type of financial relationship do you have with the external organization? Check all that apply)
		Equity (shares / options) in external company or loan
		Consulting, advisory, or speakers bureau
		Editorial compensation
		Intellectual Property rights (license / royalties paid directly to individual)
		Remuneration or Reimbursements (excluding sponsored travel)
		Sponsored or reimbursed travel
		Managerial, professional or fiduciary position (even if not compensated)
	V	Outside employment or commitment (COC form)

Click the **Continue** button.



10. Answer the questions on the SmartForms and attach any documents related to your disclosed organization, then click **Continue**. A summary of your Disclosure displays. If you need to go back

and make any corrections, click on the appropriate section in the menu bar located on the left side of the screen. If you are satisfied with your disclosure, click **Finish**.



- 11. If you need to disclose another organization, click on Add Disclosure and repeat steps 8-10. Once you have finished adding your organizations, click **Continue**.
- 12. Provide any additional information that you feel will assist in the review of your organizations by either using the textbox and/or attaching documents. Click **Continue**.
- 13. The Annual Certification: Assurance and Certification page displays. Answer the **DOE Reporting Requirements** question:

DO	E Reporting Requirements Co to forme menu 🔂 Print 👻 🚱
	rder to ensure UArizona's compliance with the Department of Education's reporting requirements, please respond to th wing question.
	o you currently have, or anticipate having in the next 12 months, any of the following affiliations with foreign institutions of er education, foreign governments, foreign companies or foreign nationals? Check all that apply: Research relatedness
H	Agreements or contracts
ň	Approximates of contractar
ň	Teaching or training engagements
n.	Consulting engagements
0	Takent recruitment programs
	Financial interests
	Visiting scholars
	Intellectual property
	Advising or mentoring engagements
	Speaking engagements
	Committees or boards
	Laboratories outside the U.S.
	Travel or site visits paid for by a foreign source
	Program evaluations paid for by a foreign source
	Contracts with, or payments to, a business owned by you
	Other
Π.	I do not have any foreign professional affiliations

14. Certify your disclosure and click **Finish**. Please note that you will not be able to make changes to your disclosed organizations without reaching out to the Office for Responsible Outside Interests. If you need to make changes, please follow steps 15 – 18.

Date submitted:							
1 Before you finish:							
To save your disclosure certification for completion at a later time: DO NOT check the confirmation box and click "Finish"							
To finalize and submit your disclosure certification for review: DO check the confirmation box and click "Finish"							
1. My disclosures are up-to-date and accurate and I confirm that I understand and agree with the above statement							
	C Exit	B Save	Finish				
	<b>O</b> EXIL	D Save	Finish				

15. Click the **Log Comment** button.



- 16. Type the request in the text box and click **OK**.
- 17. The Office for Responsible Outside Interests will receive your comment and send you a **Changes Requested** email.

You can then go in and make the changes to your disclosure by clicking Edit Disclosures.



18. Once you have made the changes to your disclosure, click **Submit Changes**.

