Disclosure of Significant Financial Interest Instructions

To make changes to disclosures WITH significant financial interests

Step 1: Modify/Recertify

When you log into your financial disclosure, click on the Modify/Recertify button at the top of your disclosure to be able to re-certify your disclosure. This will allow you to make changes to your disclosure

Step 2: Training

Complete your conflict of interest training.

If you have already completed training, the training checkbox will already be checked and your disclosure will state "Training Certified" and provide the date you completed your training on the right side of the Conflict of Interest Training box.

If you have not yet completed training the statement on the right side of the training box will state "Training not yet Certified." Please launch the conflict of interest training module and, after you have reviewed the module in its entirety, please check the certification box to certify that you have reviewed the training materials and completed your training requirement.

Step 3: Financial Entities

To edit an existing financial entity select the Edit box next to that financial entity. (NOTE: if a financial entity is no longer active, you can set it to Inactive while in edit mode by selecting the "Inactive" option from the drop down in the "Status" section).

To add a new financial entity select the + symbol to the left of "Add Financial Entity"

Step 4: Proposals/Awards

To edit an existing project select the Edit box next to the project you wish to edit.

To add a project, please e-mail the COI office with your project information. We can link the project to your disclosure using UAccess Research data. This will save you the time of having to type in the basic project identifying information.

- You can add the proposal or award yourself by selecting the + symbol to the left of the "Add Award/Proposal" statement.

Step 5: Non-Sponsored

To edit an existing non-sponsored project select the Edit box next to the project you wish to edit.

To add a non-sponsored project select the + symbol to the left of "Add Non-Sponsored (Unsponsored Activity)".

Step 6: Institutional Review Board (IRB)

To edit an existing IRB protocol select the edit box next to the project you wish to edit.

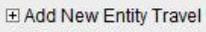To add a non-sponsored project select the + symbol to the left of "Add IRB Protocol".

Step 7: Travel Disclosure

If you were not funded by PHS when you previously disclosed but have now received PHS funding, please change the answer to Yes in the travel section and complete the travel questionnaire.
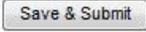

Step 8: Certification

Once you have certified that you have no changes to your financial entities, check the box in the Certification section and click on Save & Submit.

If you have issues re-certifying, please call our office at 520-626-7879.