

[Starting your disclosure](#)

[Filling out your disclosure](#)

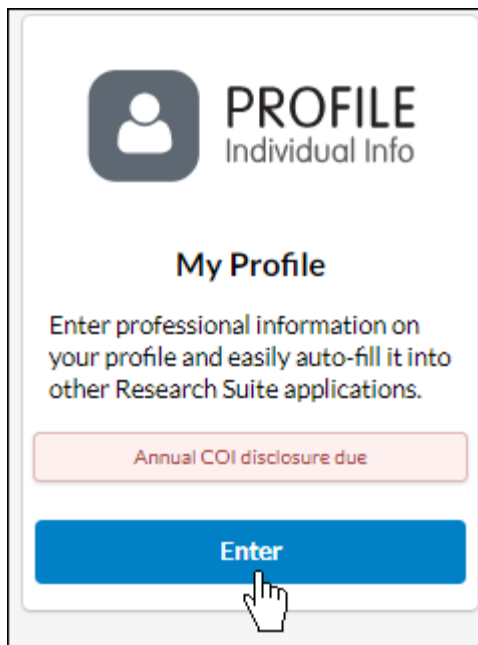
[Submitting your disclosure](#)

[Modifying your disclosure](#)

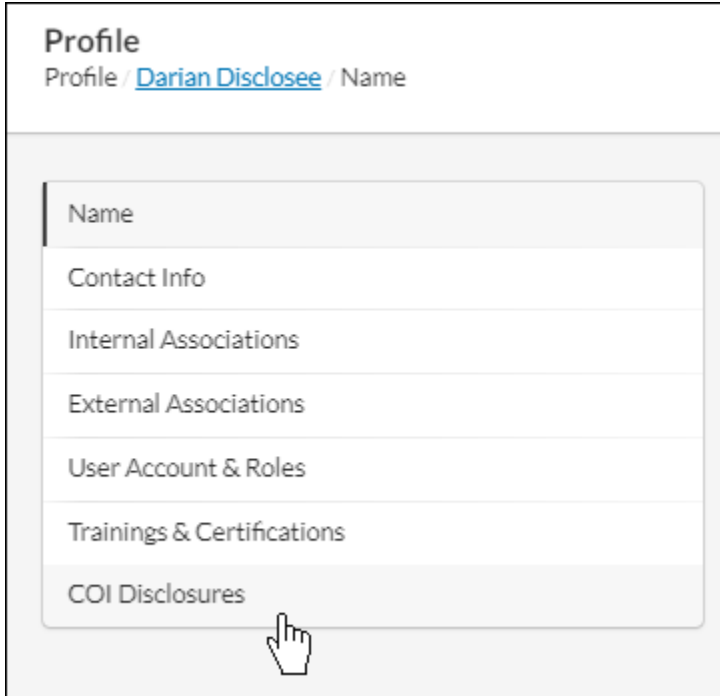
As a researcher/research staff, your Profile tile will let you know if you need to complete your Annual Disclosure, but you can also start a Research-Based disclosure from your Profile.


Starting Your Disclosure Form

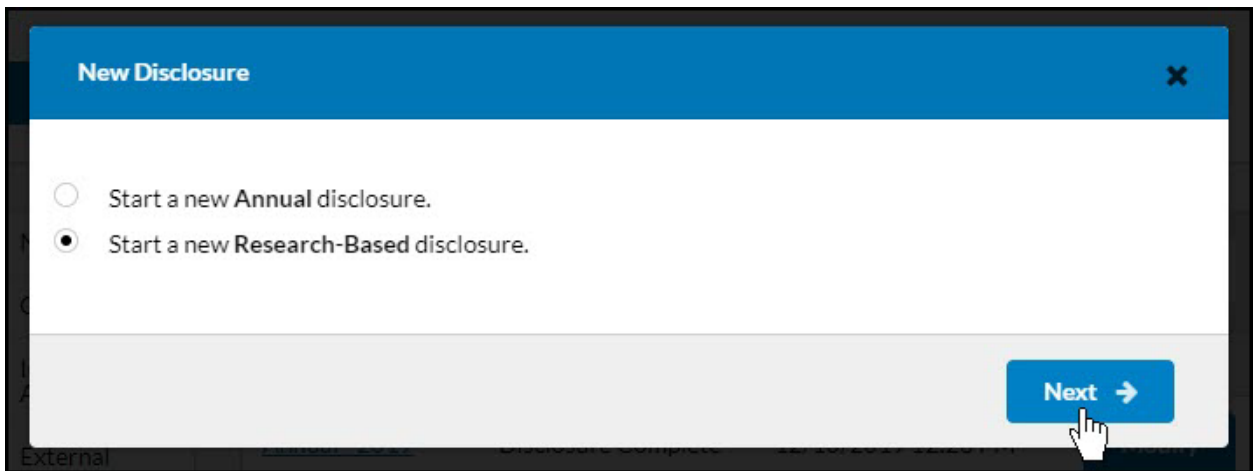
1. On your Profile tile, click **Enter**. You can also click the red banner.



2. In the left-hand menu, click **COI Disclosures**.



3. Click on .
4. Choose whether you want to fill out an Annual Disclosure or a Research-Based Disclosure, and click **Next**.



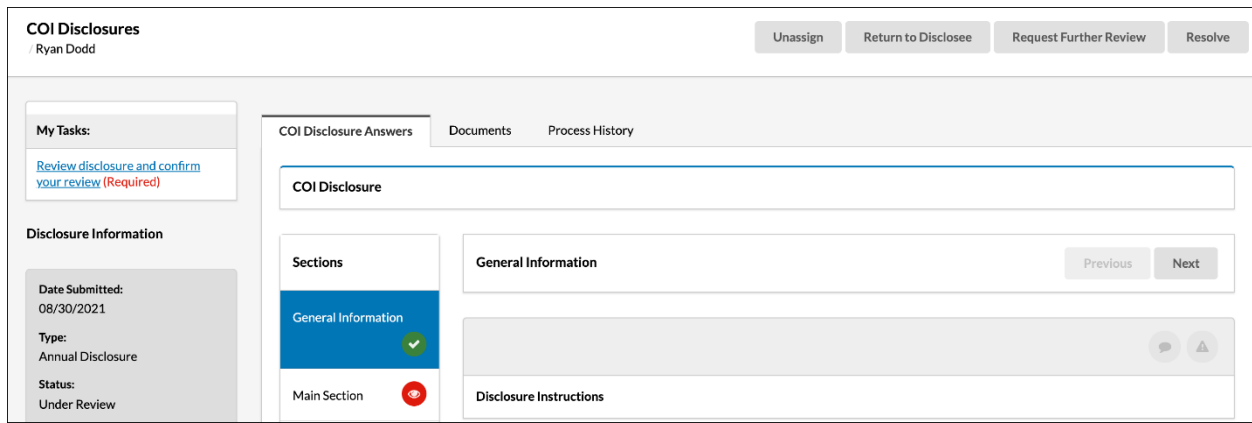
You can now begin filling out your form.

Filling Out Your Disclosure Form


While filling out a disclosure form, you may run into many different question types and form notifications.

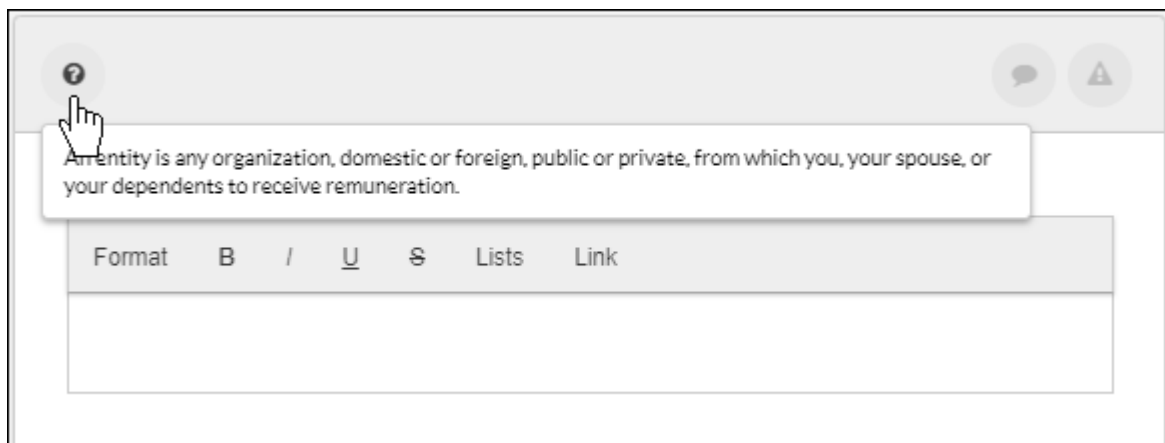
Required Alert

If a question is required, it will be marked with a red icon. Completed questions will be marked with a green icon. The sections menu on the left-hand side will also show you how many required questions are currently unanswered within each section.



Help Text Alert

A  icon indicates that help text is available. You can access the help text by hovering over the icon.



Nested Questions and Sections

Some questions and sections will only appear if you answer a certain question, or answer a question in a specific way.

5. Provide the start date of your position

MM-DD-YYYY

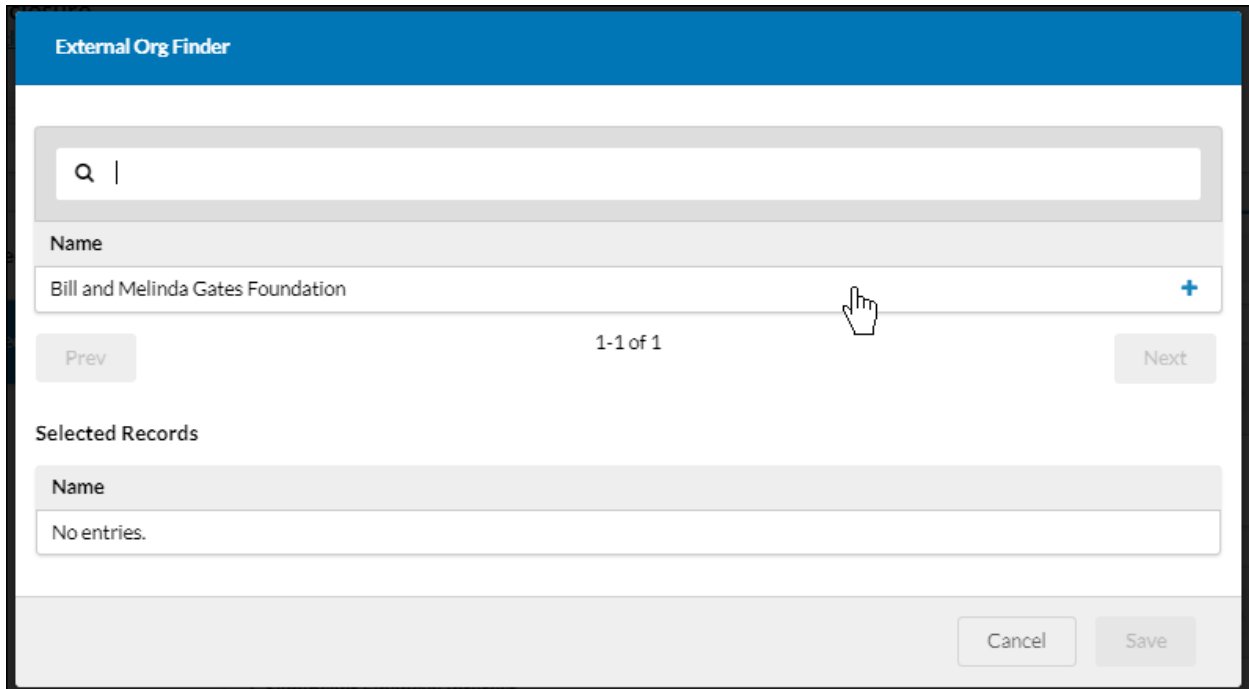
6. Disclosure Type

Select a value...

Significant Financial Interest

This question is required. You can click **Find external organization** to find organizations within the Cayuse database. Search for the organization, and then click on it to add it to the form. Don't

forget to click  .

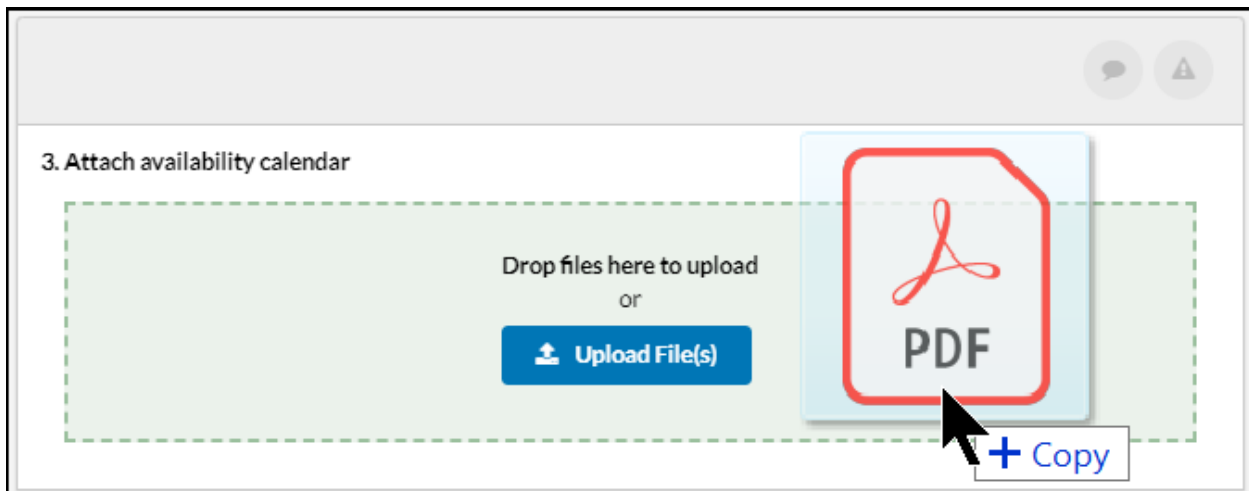


You can add as many external organizations as you need to add by clicking



Attachment Point

Attachment points allow you to upload files relevant to your disclosure form by dragging the file into the container or clicking **Upload**.



Check Box

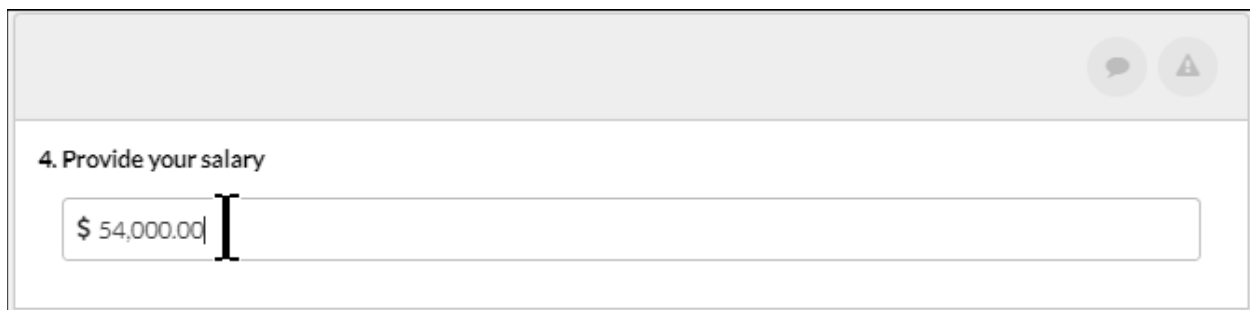
With check boxes let you choose multiple answers to a question.



A screenshot of a survey question. At the top right, there are two circular icons: a speech bubble and a warning triangle. The question is titled "2. Interests and entities" and asks, "Do any of these individuals do business with the University in an area in which you make spending decisions?". Below the question are three options, each with a checkbox: "You" (checked), "Your spouse" (unchecked), and "Your dependent children" (checked). A hand cursor is pointing at the checked box for "Your dependent children".

Currency Input

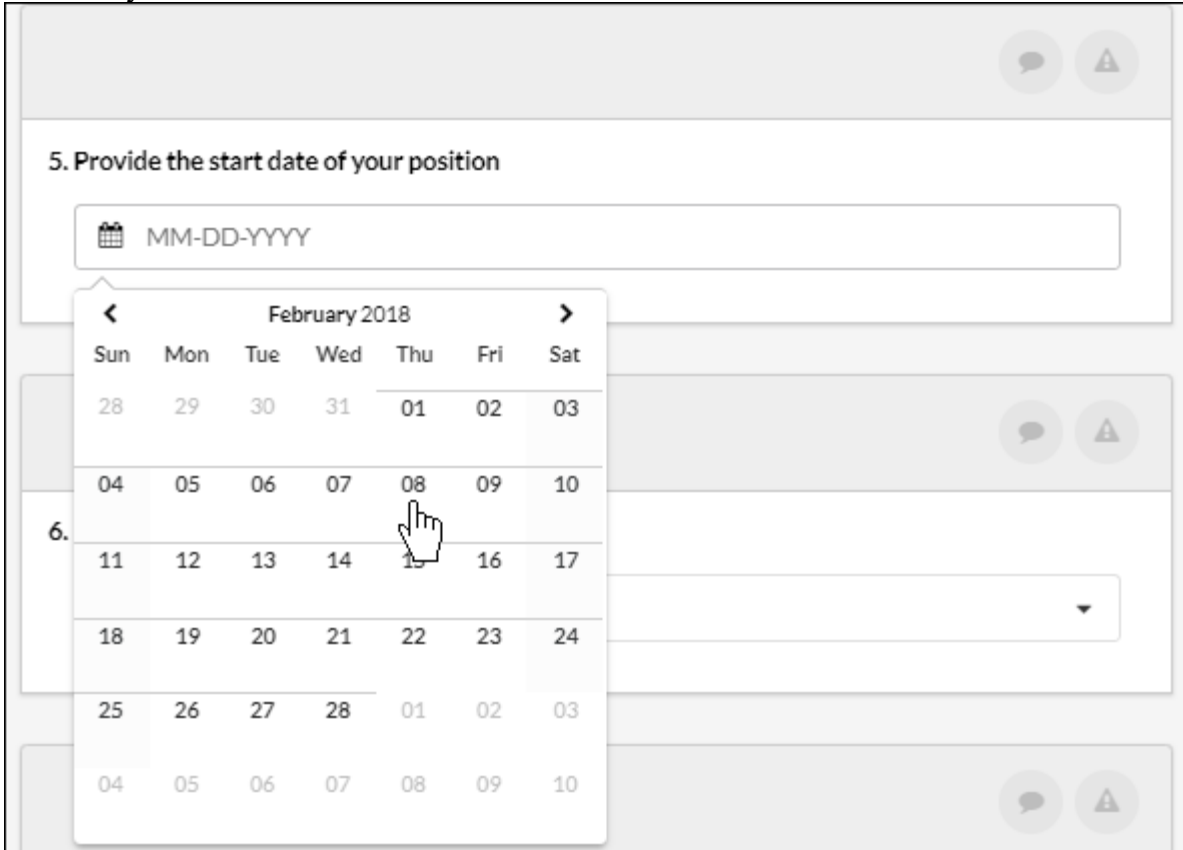
This question type provides a field where you can input a currency amount.



A screenshot of a survey question. At the top right, there are two circular icons: a speech bubble and a warning triangle. The question is titled "4. Provide your salary". Below the question is a text input field containing the value "\$ 54,000.00". A vertical cursor is positioned at the end of the text in the input field.

Date Input

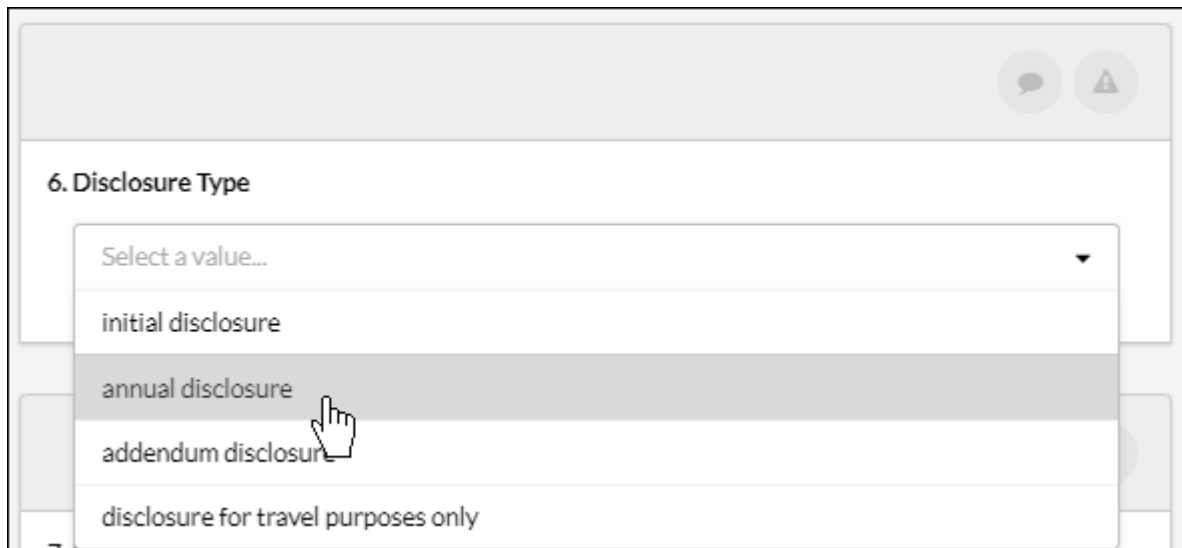
Clicking on a date field will generate a calendar where you can choose a specific date. You can also manually fill the date



in.

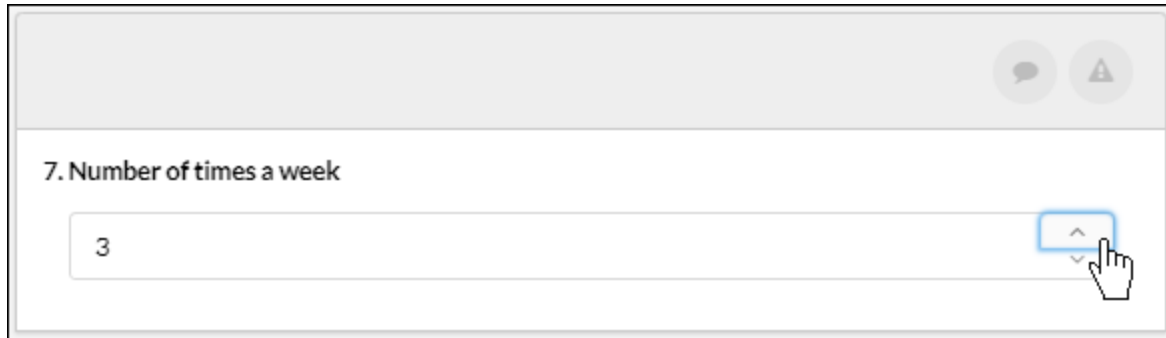
Dropdown

Dropdown questions allow you to select one answer from a drop-down list.



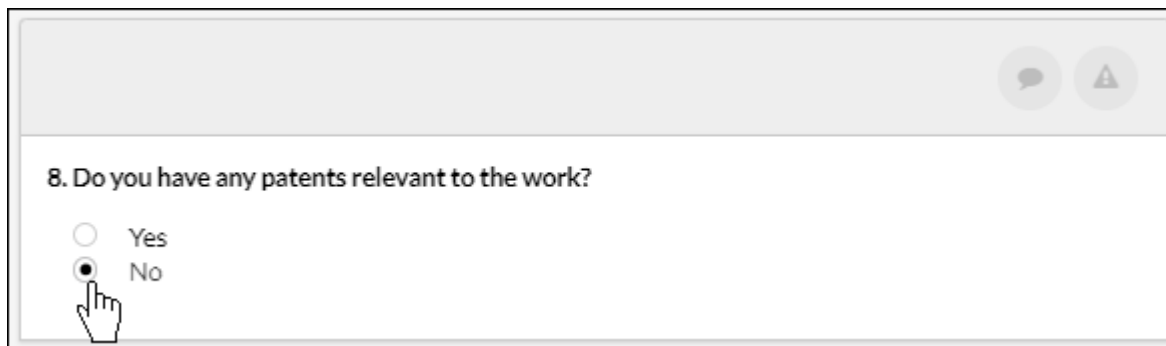
Numeric Input

By using the up and down arrows, you can input a numeric value as an answer to the question.

A screenshot of a question interface. At the top right, there are two circular icons: a speech bubble and a warning triangle. Below them, the question text reads "7. Number of times a week". Underneath the question is a numeric input field containing the number "3". To the right of the input field is a small blue box containing an upward-pointing arrow and a downward-pointing arrow. A hand cursor is pointing at the upward arrow.

Radio Button

Like check box objects, radio button objects are a multiple-choice question. However, with this question type, You can only choose one answer.

A screenshot of a question interface. At the top right, there are two circular icons: a speech bubble and a warning triangle. Below them, the question text reads "8. Do you have any patents relevant to the work?". Underneath the question are two radio button options: "Yes" and "No". The "No" option is selected, indicated by a filled-in circle. A hand cursor is pointing at the "No" radio button.

Rich Text Input

The rich text input object provides a text box that you can use to fill in your answer. The box has no character limit, and provides both font customizations and an option to hyperlink.

9. Describe your relationship to the entity or activity

Format B I U S Lists Link

I am **describing** my *relationship*. This is a [link](#) |

Table

If a question contains a table, it means that every input will have multiple fields for you to fill out. You can add another row to the table by clicking **Add Row**.

Location	Individual	Does this person compete with the institution for project funding?
Tuscaloosa, AL	Annetta Analyst ✕ clear	<input type="radio"/> Yes <input checked="" type="radio"/> No
	No person selected. Find person.	<input type="radio"/> Yes <input type="radio"/> No

+ Add Row

Text Input


The text input field is for short answers, such as addresses or locations. This is a plain text field.

The image shows a screenshot of a web form. At the top right, there are two circular icons: a speech bubble and a warning triangle. Below these is the section title "10. Location". Underneath the title is a text input field with the text "Tuscaloosa, AL" and a vertical cursor. To the right of the input field is a blue button with the word "Save" in white text.

Finders

Finders allow you to search for people, organizations, or units within the Cayuse database. With finders, you don't have to manually input data, so there is less of a chance for errors.

Click on the **Find** button to search. You can add the person, organization, or unit by clicking the

+ next to their name. When you're finished, click .

Person Finder

Q Click to search...

Name	Email	Phone	
Abhay Analyst	sarah.raynor+abhay@cayuse.com	--	+
Amani Admin	sarah.raynor+amani@cayuse.com	--	+
Annetta Analyst	sarah.raynor+annetta@cayuse.com	--	+
Aran Admin	sarah.raynor+aran@cayuse.com	--	+
Darian Disclosee	sarah.raynor+darian@cayuse.com	--	+

Prev 1-5 of 12 Next

Selected Records

Name	Email	Phone	
Annetta Analyst	sarah.raynor+annetta@cayuse.com	--	✗
Abhay Analyst	sarah.raynor+abhay@cayuse.com	--	✗

Cancel Save

Your selected records are now added to the form.

First Name	Last Name	Email	Phone	
Annetta	Analyst	sarah.raynor+annetta@cayuse.com	--	✗
Abhay	Analyst	sarah.raynor+abhay@cayuse.com	--	✗

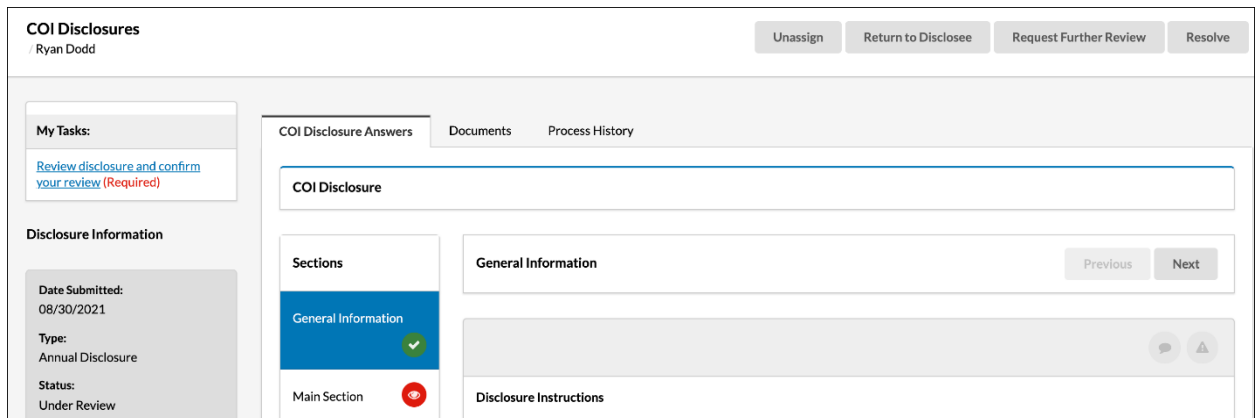
Q Find Person

Submitting Your Disclosure Form

Once you are done filling out your disclosure form, you can submit your form for review.

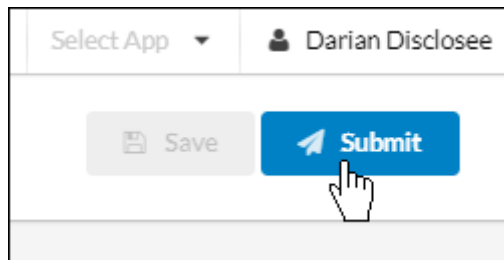
Submitting Your Form

1. Begin and fill out your form.
2. Double check your form to make sure that you have answered all required questions. Unanswered required questions are marked with a red icon.



The screenshot shows the 'COI Disclosures' interface for user 'Ryan Dodd'. At the top right, there are buttons for 'Unassign', 'Return to Disclosee', 'Request Further Review', and 'Resolve'. On the left, a 'My Tasks' box contains a link to 'Review disclosure and confirm your review (Required)'. Below that, 'Disclosure Information' shows 'Date Submitted: 08/30/2021', 'Type: Annual Disclosure', and 'Status: Under Review'. The main area has tabs for 'COI Disclosure Answers', 'Documents', and 'Process History'. Under 'COI Disclosure Answers', there is a 'COI Disclosure' section with a 'General Information' sub-section marked with a green checkmark and a 'Main Section' marked with a red eye icon. A 'Previous' and 'Next' navigation bar is visible. At the bottom right, there are icons for chat and a warning triangle.

3. Click **Submit** in the upper left-hand corner.



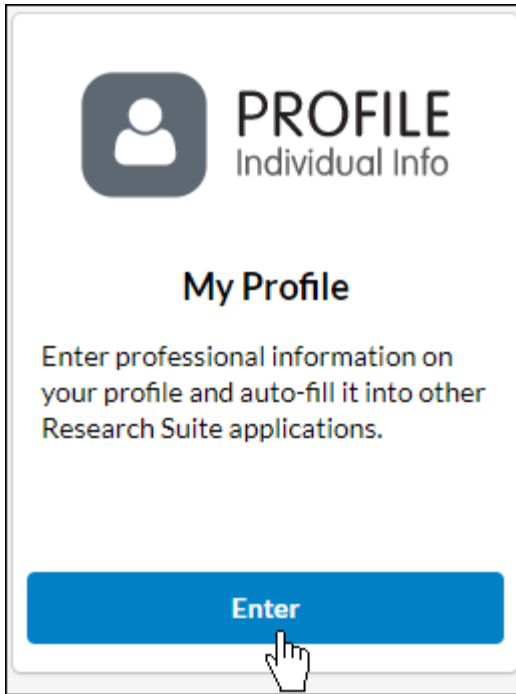
The screenshot shows a confirmation dialog with a 'Select App' dropdown and a user profile for 'Darian Disclosee'. At the bottom, there are two buttons: a grey 'Save' button and a blue 'Submit' button with a white arrow icon. A hand cursor is pointing at the 'Submit' button.

4. Confirm your submission by clicking **Proceed**.

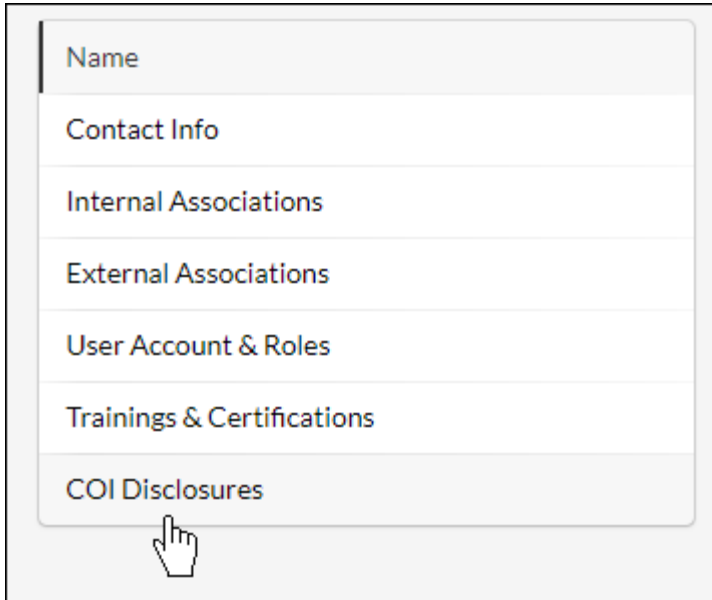
Modifying Your Disclosure Form

If your conflicts of interest change and you need to modify your disclosure, you can do so from your user profile.

1. From the landing page, click on **My Profile**.



2. Click on **COI Disclosures**.



3. Next to your newest completed disclosure, click **Modify**. **Please note:** if you have any disclosures in the review process, you will not see the Modify button.

Disclosure Name	Status	Submission Date	
Annual - 2019	Disclosure Complete	12/10/2019 12:28 PM	Modify
Annual - 2019	Disclosure Complete	09/06/2019 3:07 PM	
Annual - 2019	Unsubmitted		
Disclosure	Disclosure Complete	03/15/2019 9:33 AM	
Disclosure	Unsubmitted		

4. Modify any part of your disclosure that has changed, and click **Submit**.

The screenshot shows a web interface with a blue header bar. On the left, there is a logo and the text 'Products' with a dropdown arrow. On the right, there is a user profile icon and the name 'Darian Disclosee' with a dropdown arrow. Below the header, there are two buttons: a grey 'Save' button with a floppy disk icon and a blue 'Submit' button with a paper plane icon. A hand cursor is pointing at the 'Submit' button. Below these buttons, there is a white box containing two grey buttons: 'Previous' and 'Next'.

Upon clicking Submit, your disclosure will go through the review process. You will receive an email when your disclosure has been resolved.

Please note: Upon deletion of an answer, you won't be able to retrieve your old response and will have to re-enter it if the deletion was a mistake.