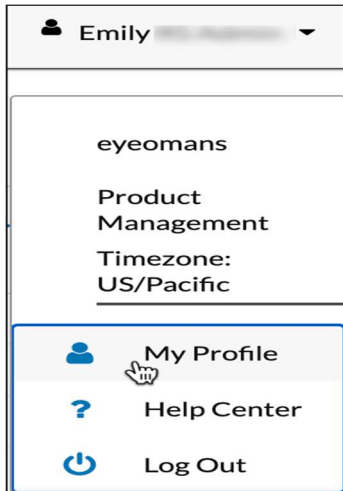


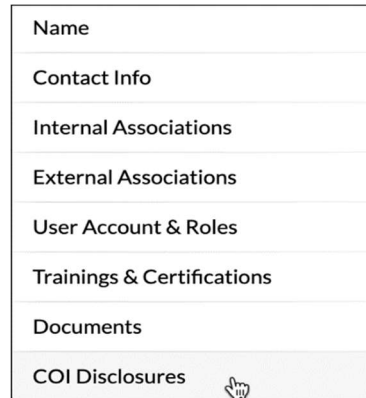
Annual COI Disclosure Form in Cayuse

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.

1) From your profile in upper right-hand corner, click My Profile.



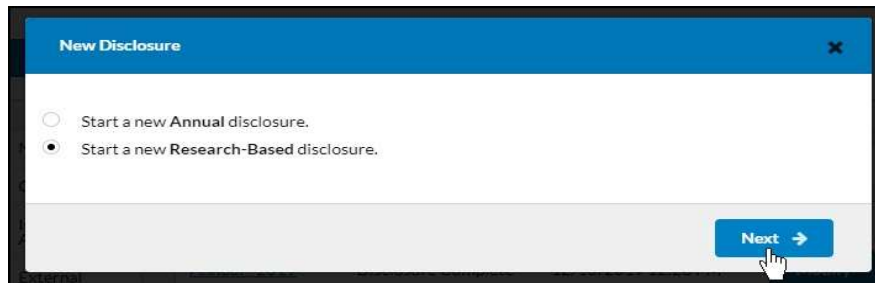
2) In the left-hand menu, click COI Disclosures.



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.

cayuse

Outside Interests

Dashboard

Disclosures

Reporting

More ▾

Q Click to search...

Disclosure Name ▾	Disclosee ▾	Proposal	Unit	Status ▾	Resolution ▾	Submit
Annual - 2022	Patricia Cornette		3370 - Sponsored Research - Programs L4	Unsubmitted		

25 per page ▴

1-1 of 1

Not everyone may need to complete a COI disclosure.

cayuse

My Profile

Dashboard

Disclosures

Reporting

More ▾

Form Preview

[Forms](#) / [Annual Disclosure](#) / Form Preview

Sections

General Information

Disclosure Questions

Disclosure Questions

Classification *

Please select your employee classification or student status below.

Definitions:
SHRA - Employees subject to the State Human Resources Act of NC
EHRA - Employees exempt from the State Human Resources Act of NC

☒ Student (Undergraduate & Graduate)

☐ SHRA employees who are paid with sponsored research funds who are employed by UNC Pembroke

☐ SHRA employees who are NOT paid with sponsored research funds who are employed by UNC Pembroke

☐ EHRA

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

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.

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.

The screenshot shows the 'COI Disclosures' page for user 'Ryan Dodd'. The left sidebar contains 'My Tasks' with a link to 'Add First Reviewer (Required)' and a 'Pass to First Reviewer' button. Below this is 'Disclosure Information' showing the date submitted (11/04/2021), type (Annual Disclosure), and status (Under Pre-Review). The main content area has tabs for 'COI Disclosure Answers', 'Documents', and 'Process History'. The 'COI Disclosure' section is active, showing a list of sections: 'General Information' (marked with a red icon), 'Disclosure Questions' (marked with a green icon), 'Compensation or Expense Reimbursement' (marked with a green icon), 'External Positions' (marked with a green icon), 'Equity or Ownership Interests' (marked with a green icon), and 'Certification & Acknowledgement' (marked with a green icon). The 'General Information' section is expanded, showing instructions for submitting the annual disclosure and a list of required users: All EHRA faculty (9-month, 12-month, and part-time), EHRA non-faculty, and Designated SHRA employees who are paid with sponsored research funds.

This screenshot shows the 'Disclosure Questions' section. On the left, a 'Sections' sidebar lists 'General Information' (green icon), 'Disclosure Questions' (red icon with '7'), 'Compensation or Expense Reimbursement' (red icon with '2'), and 'Certification & Acknowledgement' (red icon with '1'). The main area displays the 'Classification' question, which asks the user to select their employee classification or student status. The options are: Student (Undergraduate & Graduate), SHRA employees who are paid with sponsored research funds who are not paid with sponsored research funds, SHRA employees who are NOT paid with sponsored research funds, and EHRA. The 'EHRA' option is selected. Below this is a question asking if the user or their immediate family receive compensation or expense reimbursement, with 'Yes' and 'No' radio buttons. The 'Yes' option is selected. At the bottom, there is a red icon with an exclamation mark and a question about income from any individual, with a note that 'Institutional Responsibilities' consist of assigned teaching, scholarship, etc.

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.

The 'External Org Finder' dialog box is shown. It has a search bar at the top. Below the search bar, the 'Name' field contains 'Bill and Melinda Gates Foundation'. There are 'Prev' and 'Next' buttons, and a '1 of 1' indicator. Below this, the 'Selected Records' section shows 'No entries.' At the bottom, there are 'Cancel' and 'Save' buttons.

Don't forget to click:

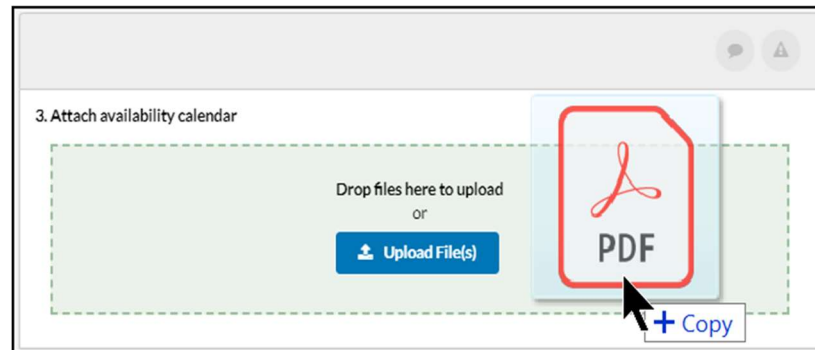
Save

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

+ Add New Relationship

(If you respond “Yes” to any question, there will be some additional related questions to respond to, please respond with as much detail as possible. You may receive a follow-up from OSRP regarding the possible need for a management plan.)

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



If you have any system access questions please review [Cayuse's Help Center](#) for guidance.

For information on modifying your disclosure: <https://support.cayuse.com/hc/en-us/articles/360039723874-Modifying-Your-Disclosure-Form>

For questions related to:

Annual Disclosure contact Nicolette Campos (nicolette.campos@uncp.edu) or Sheila Hardee (sheila.hardee@uncp.edu)

Research-Based Disclosures contact osrp@uncp.edu or Patricia Cornette (patricia.cornette@uncp.edu)