

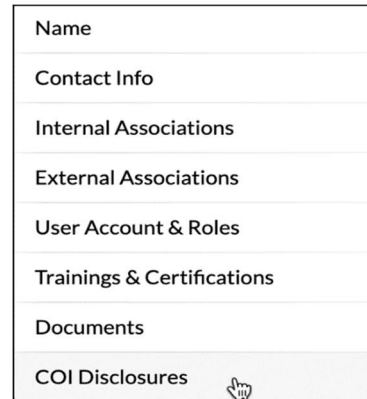
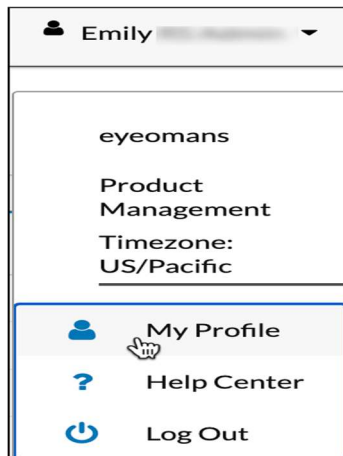
## Starting Your Research-Based COI Disclosure Form in Cayuse

All investigators and key personnel named in a Cayuse SP application must complete the **Conflict of Interest** section prior to the proposal being submitted to the sponsor. **\*\* At this time Cayuse does not send an automated email notifying them that this needs to be done.\*\*** It is important everyone involved in a key role is aware of this and completes this step, so no proposal misses a deadline

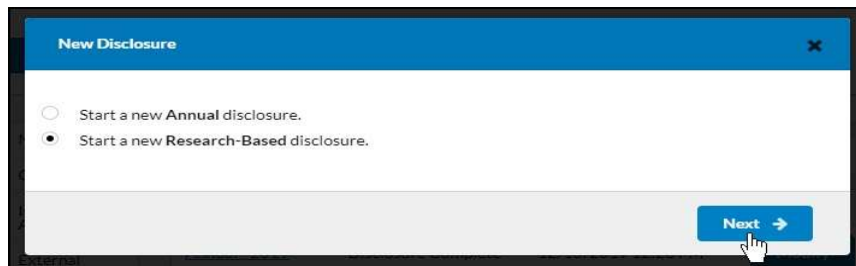
Please ensure that all approving parties know about the proposal and know the agreement you reached regarding allocation of credit and time/effort devoted to the project be sure what is stated is consistent with your expectation.

Completing Research-Based/Project-Specific COI information:

- 1) From your profile in upper right-hand corner,
- 2) In the left-hand menu, click COI Disclosures.
- 3) Click on



- 4) Choose a Research-Based Disclosure and click Next.



- 5) Please note, you will need to know the following information to complete the project specific COI. If you need our assistance locating this information, please email [osrp@uncp.edu](mailto:osrp@uncp.edu).

1. Cayuse SP Proposal Number
2. Project Title
3. Sponsor
4. Your Role on the Project

You can now begin filling out your form.

**TIP:** If you are part of a team in which the Principal Investigator is from another unit and that unit is charged with routing the Cayuse application, make sure you complete your project-related COI! Directions on how to do so are [available here](#). This involves using the module Cayuse Outside Interests, further explained below.

As you answer questions, new sections relevant to the type of disclosure being completed will appear on the left-hand side. Therefore, not all sections may appear. You do not have to finish the application in one sitting. All information can be saved. (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.)

The screenshot shows the left-hand navigation menu with four sections: 'General Information' (1 question), 'Disclosure Questions' (7 questions, highlighted in blue), 'Equity Interest' (2 questions), and 'Certification' (2 questions). The main content area displays two questions. The first question is: 'Have you or your immediate family member received or expect to receive income from your primary employer should not be included. \*' with a subtext 'If YES, please complete the INCOME Section'. It has two radio button options: 'Yes' and 'No', with 'No' selected. The second question is: 'Do you or your immediate family member currently hold or plan to hold equity in any company or organization that has a direct control over the investments. \*' with a subtext 'If YES, please complete the EQUITY INTEREST Section'.

(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.

The screenshot shows a section titled '3. Attach availability calendar'. It features a dashed green box for file upload. Inside the box, there is a blue button labeled 'Upload File(s)' and a text prompt 'Drop files here to upload or'. A PDF file icon is shown being dragged into the box, and a mouse cursor is hovering over it with a '+ Copy' tooltip.

Once you're done you'll need to acknowledge and certify. And select "proceed" to submit the disclosure for review. The submitted disclosure will then appear on your COI Disclosure page.

The screenshot shows the 'Certification' section of a COI Disclosure form. On the left is a sidebar with a 'Sections' menu. The menu items are: 'General Information' (with a red circle containing '6'), 'Disclosure Questions' (with a red circle containing '7'), 'Equity Interest' (with a red circle containing '2'), and 'Certification' (highlighted in blue with a green checkmark). The main content area is titled 'Certification' and contains two sections: 'COI Training \*' and 'Disclosure Information \*'. The 'COI Training \*' section includes a link to the 'UNCP COI Training Site' and a checkbox labeled 'I certify that I've completed the required COI training.' which is checked. The 'Disclosure Information \*' section includes a checkbox labeled 'I certify that the information provided within this disclosure form is complete and accurate to the best of my knowledge.' which is also checked.

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

**\*\*Reminder: if you are NOT the PI, but are co-investigator or other key personnel, you are not included in the Cayuse SP routing (approval) process, but review and approval is needed from your department Chair and from your Dean. \*\***

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**For questions related to:**

**Annual Disclosure** contact Nicolette Campos ([nicolette.campos@uncp.edu](mailto:nicolette.campos@uncp.edu)) or Sheila Hardee ([sheila.hardee@uncp.edu](mailto:sheila.hardee@uncp.edu))

**Research-Based Disclosures** contact [osrp@uncp.edu](mailto:osrp@uncp.edu) or Patricia Cornette ([patricia.cornette@uncp.edu](mailto:patricia.cornette@uncp.edu))

**EPAP Disclosures** contact Liz Normandy ([elizabeth.normandy@uncp.edu](mailto:elizabeth.normandy@uncp.edu)).