

# Step-by-Step Instructions for Submitting Your Annual COI Disclosure

**Due each year by September 30th**

When you login to the system, you will land on the [Cayuse Outside](#) Interests homepage. Click **“COI Disclosures”** on the bottom left-hand side of the screen

The screenshot shows the 'My Profile' page in the Cayuse system. On the left, there is a navigation menu with options: Name, Contact Info, Internal Associations, External Associations, User Account & Roles, Trainings & Certifications, Documents, and COI Disclosures. The 'COI Disclosures' option is highlighted with a red arrow. The main content area features a search bar and a table of disclosures. The table has columns for 'Disclosure Name', 'Status', and 'Submission Date'. One disclosure is listed: 'Annual - 2021' with a status of 'Disclosure Complete' and a submission date of '08/11/2021 9:27 AM'. A 'Modify' button is next to this entry. Below the table, there is a pagination control showing '1' of 1 items. In the top right corner, there is a '+ New Disclosure' button. A help icon (question mark) is visible in the bottom right corner.

Start by Going to the [Cayuse Outside Interests](#) page and click on the **Outside Interest** Login (located next to the horse icon). Once you're logged in, follow the steps below:

Click the **“New Disclosure”** button on the top right

+ New Disclosure

Click the disclosure type – **Annual Disclosure** (Not Research-Based)

**IMPORTANT:** All External Professional Activities—whether for pay or not—must be disclosed using the **“Notice of Intent”** form in Cayuse. **Do NOT use** **“Annual Disclosure or Updated Annual Disclosure”** for this purpose.

Type of Disclosure \*

Please Identify whether this is an Annual Disclosure or an External Professional Activity - Notice of Intent Disclosure

Annual Disclosure or Updated Annual Disclosure

Notice of Intent Disclosure for External Professional Activities

Follow the instructions for completing the disclosure. Once a section is complete, click the “next” button to navigate to the next section

All Changes Save Automatically

Sections

- General Information: ✓
- Disclosure Questions: 2
- Certification: 2

Disclosure Questions

Previous Next

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.

Your Classification\*

Please select your employee classification below.

- Faculty
- Senior Academic and Administrative Officer (SAAO)
- Exempt Professional Staff (EPS)
- Senior/Key personnel paid by a sponsored research award and engaged in the design, conduct, or reporting of the sponsored research
- Individual Required via sponsored project award terms

Field must not be empty

Once a section is complete, a green checkmark will appear next to the section name

All Changes Save Automatically

Sections

- General Information: ✓
- Disclosure Questions: ✓
- Certification: 2

Disclosure Questions

Previous Next

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## When the disclosure form is complete, you'll need to certify the disclosure

The screenshot shows the 'Certification' section of a disclosure form. On the left, a sidebar lists 'General Information:', 'Disclosure Questions', and 'Certification' with a red arrow pointing to the 'Certification' item. The main content area has a blue header 'Certification' with 'Previous' and 'Next' buttons. Below the header, there are two text boxes. The first text box contains the text: 'I will complete a Notice of Intent (NOI) at least 10 days prior to beginning an external professional activity that is related to the responsibilities for which I am hired at UNCG. The information disclosed on any Notice of Intent forms I have submitted is consistent with the Board of Governors' policy on Conflict of Interest and Commitment (Section 300.2.2 of the UNC Policy Manual).' Below this text is a checkbox labeled 'I agree to the above certification and acknowledgement' with a red arrow pointing to it. The second text box contains the text: 'I certify that I have provided all information related to my potential conflicts of interests or the perception of such conflicts of interest and that the information provided is factual and accurate. I understand that it is my responsibility to update this form within 30 days of any change.' Below this text is another checkbox labeled 'I agree to the above certification and acknowledgement' with a red arrow pointing to it. At the top right of the form, it says 'All Changes Save Automatically'.

## Once certified, click "submit"

This screenshot is similar to the previous one, but the 'Certification' item in the sidebar now has a green checkmark. In the main content area, the checkboxes for 'I agree to the above certification and acknowledgement' are now checked. At the top right, the 'Submit' button is highlighted with a red arrow. The 'Previous' button is also visible. The text in the two text boxes remains the same as in the previous screenshot.

## Click "proceed" to submit the disclosure for review

The screenshot shows a dark-themed dialog box titled 'Routing Confirmation'. It contains the text: 'I certify that I have provided all information related to my potential conflicts of interests or the perception of such conflicts of interest and that the information provided is factual and accurate.' Below this text is a checked checkbox labeled 'I agree to the above certifications and acknowledgements'. A white paper airplane icon is positioned to the left of the question: 'Are you sure you want to route your disclosure?'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Proceed'. A red arrow points to the 'Proceed' button.

## The submitted disclosure will then appear on your COI Disclosure page

- Name
- Contact Info
- Internal Associations
- External Associations
- User Account & Roles
- Trainings & Certifications
- Documents
- COI Disclosures

Q Click to search...

Disclosure Name	Status	Submission Date	
<a href="#">Annual - 2021</a>	Disclosure Complete	06/16/2021 3:52 PM	
<a href="#">Annual - 2021</a>	Under Pre-Review	06/10/2021 12:55 PM	
<a href="#">Annual - 2021</a>	Under Pre-Review	06/10/2021 12:52 PM	
<a href="#">Research-Based Disclosure</a>	Disclosure Complete	06/10/2021 12:39 PM	<a href="#">Modify</a>
<a href="#">Research-Based Disclosure</a>	Disclosure Complete	06/10/2021 12:37 PM	<a href="#">Modify</a>
<a href="#">Annual - 2021</a>	Under Pre-Review	04/29/2021 12:28 PM	
<a href="#">Annual - 2021</a>	Disclosure Complete	04/22/2021 12:47 PM	

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