

## Tip Sheet: How to add new Outside Entities or Family Collaborations in a Project or Manual Disclosure

1. SAVE all your previous work in the Project or Manual Disclosure before entering new **Outside Entity or Family Collaborations** using the **Save** button at the bottom of the disclosure.



2. Open the **Project & Outside Entities or Family Collaboration Relationships** panel by clicking on the ">" next to it.



3. At the top of this panel, there is an option to add a new **Outside Entity or Family Collaboration**. Click that button.



4. An **Outside Entity and Family Collaboration** document will open. Complete that document and click **Submit**. You will be returned to your **Project or Manual Disclosure**. (For information on how to complete an **Outside Interest or Family Collaboration**, refer to the appropriate **Tip Sheet**, titled "**Tip Sheet: How to Enter Outside Entities**" and "**Tip Sheet: How to Enter a Family Collaboration**" respectively.)
5. **SAVE**
6. Open the **Disclosed Projects** panel again.
7. Click on **Show** next to **Outside Entities and Family Collaborations**.

8. For the newly entered **Outside Entity or Family Collaboration**, select a relationship from the drop-down menu.

The screenshot shows a table with two rows of entities. Row 1: 'Takeda Pharmaceuticals North America' with buttons for 'View Entity', 'Edit', and 'History'. Row 2: 'Lobo Louie' with buttons for 'View Entity', 'Edit', and 'History'. To the right, a dropdown menu is open, showing options: 'No Known Relationship', 'Potential Relationship' (selected with a checkmark), and 'Relationship Identified'.

9. **SAVE**

10. Repeat steps 6-9 for **each project** listed. Failure to do so will result in an error.

11. Review and complete (if needed) the rest of the **Disclosure** and **Submit**.

The screenshot shows a 'Certification' form. It includes a text block stating: 'I agree to abide by the University of New Mexico's Faculty Handbook Policy E:110, Conflict of Interest in Research [https://handbook.unm.edu/e110/]. I supply this information for review by the University of New Mexico, and for such other purposes as are required by law, regulation, policy, or contract. I understand and agree that if there is a material change to this information (for example, an acquisition of a significant financial interest or a modification of my existing professional arrangement(s) outside UNM), I must update the associated outside entities and my master disclosure within 30 days of that change.' Below this is a section titled 'Certification - Not yet certified' with a checked checkbox and the text: 'In submitting this disclosure, I certify that the information provided is true to the best of my knowledge.' At the bottom, there are two fields: 'Reporter' with the value 'Lobo Lucy' and 'Certification Date' with the value 'N/A'. There are also 'Submit' and 'Print' buttons.

12. **Errors.** The most common error when entering a new **Outside Entity or Family Collaboration** from within a disclosure is forgetting to enter a **relationship** between a project and a new **Outside Entity or Family Collaboration**.

To correct the error repeat steps 6-9 for each project and don't forget to **SAVE**.