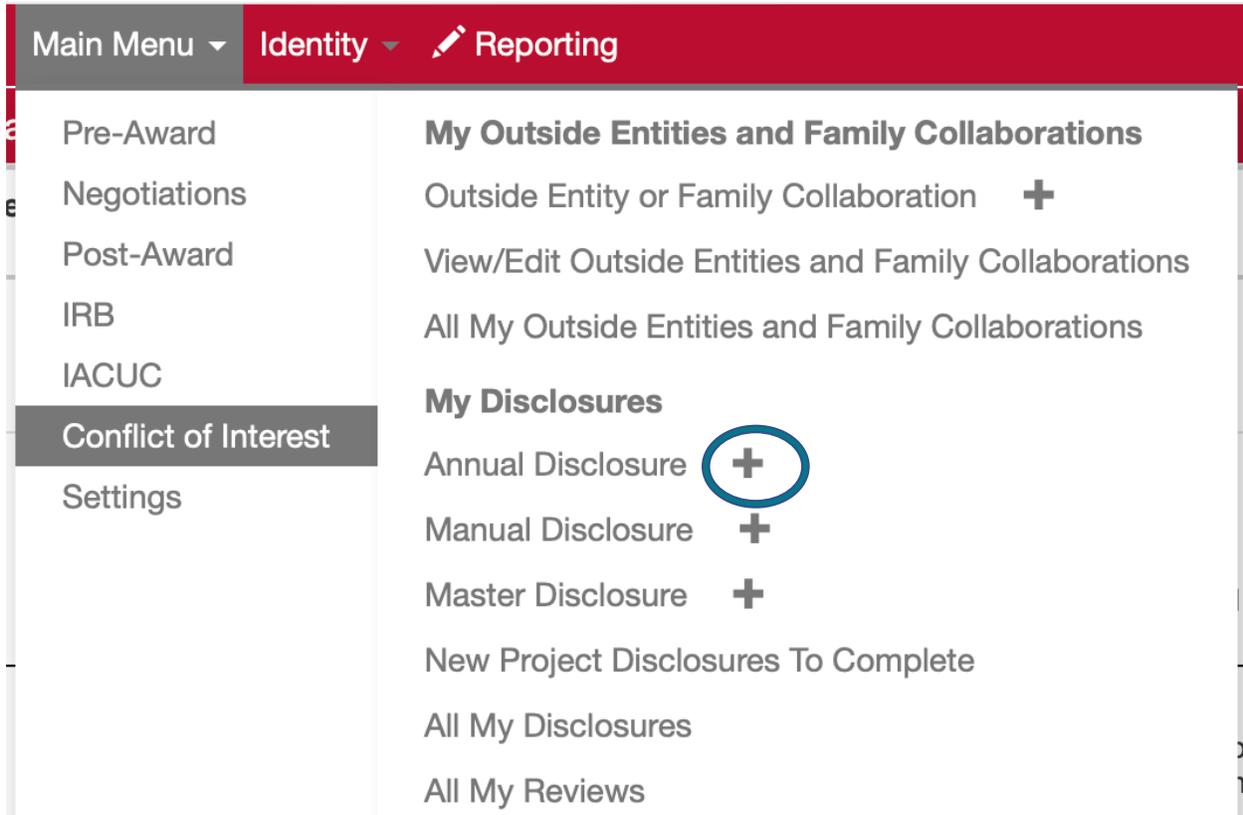


e. Should you not complete them, you will get an error message and can complete them from within the Annual. It is, however, easier to find what is incomplete if you do them individually beforehand.

2. From menu, click on the “+” next to the Annual Disclosure.



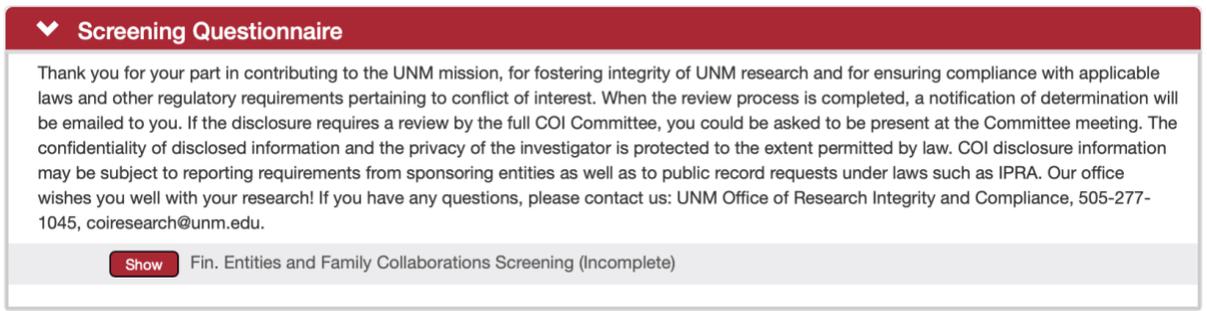
The screenshot shows a navigation menu with a red header. The header contains 'Main Menu', 'Identity', and 'Reporting'. The 'Reporting' section is expanded, showing a list of options: 'Pre-Award', 'Negotiations', 'Post-Award', 'IRB', 'IACUC', 'Conflict of Interest', and 'Settings'. The 'Conflict of Interest' option is highlighted. To the right of the menu, there are sections for 'My Outside Entities and Family Collaborations' and 'My Disclosures'. The 'My Disclosures' section includes 'Annual Disclosure', 'Manual Disclosure', and 'Master Disclosure', each with a plus sign icon. The 'Annual Disclosure' plus sign is circled in blue.

3. Click the “>” next to the **Screening Questionnaire** tab.



The screenshot shows a red tab labeled 'Screening Questionnaire' with a right-pointing arrow icon.

4. Click on **Show**



The screenshot shows the content of the 'Screening Questionnaire' tab. It features a red header with a dropdown arrow and the text 'Screening Questionnaire'. Below the header is a paragraph of text: 'Thank you for your part in contributing to the UNM mission, for fostering integrity of UNM research and for ensuring compliance with applicable laws and other regulatory requirements pertaining to conflict of interest. When the review process is completed, a notification of determination will be emailed to you. If the disclosure requires a review by the full COI Committee, you could be asked to be present at the Committee meeting. The confidentiality of disclosed information and the privacy of the investigator is protected to the extent permitted by law. COI disclosure information may be subject to reporting requirements from sponsoring entities as well as to public record requests under laws such as IPRA. Our office wishes you well with your research! If you have any questions, please contact us: UNM Office of Research Integrity and Compliance, 505-277-1045, coiresearch@unm.edu.' At the bottom of the content area, there is a red button labeled 'Show' followed by the text 'Fin. Entities and Family Collaborations Screening (Incomplete)'.

- Complete the **Screening Questionnaire**.
- SAVE** using the red **SAVE** button at the bottom of the disclosure.



- Click on the “>” next to the **Questionnaire** Tab.



- Click on **Show** to complete the **COI Annual Disclosure**.



- SAVE**

- Click on the “>” next to **Disclosed Projects**.

Notes: If you have no projects disclosed or no financial entities, there will be nothing in this panel.

The only projects that should be listed are those for which the end date is after the date that you complete the disclosure. This will include legacy data for old proposals. As time goes on these will gradually disappear.



- Review the **Project Disclosures** submitted by clicking **show** next to each one.

	Event	Project Id	Project Title	Disposition Status	Disclosure Status
Show	Proposal	282	Biocomposting of zoological waste for onsite bioenergy production	Relationship Identified	Approved
Show	Proposal	276	Comparing the microbiomes of Grey Wolves fed popcorn vs hotdogs.	Relationship Identified	Approved

- Doing so will display something that looks like this (redacted):

Proposal Number: [REDACTED]

Disposition: Conflict Managed

Institutional Proposal Title: Advanced Computing for Defense Applications

Start Date: [REDACTED] End Date: [REDACTED]

Sponsor: [REDACTED]

PI Name: [REDACTED]

[Show](#) COI Project Disclosure (Incomplete)

[Show](#) Outside Entities and Family Collaborations

13. Check to make sure that the **Project Disclosure** is **complete**.

[Show](#) COI Project Disclosure (Complete)

14. If it is not click **Show** and complete it.

15. Next click **Show** next to **Outside Entities and Family Collaborations**.

[Show](#) Outside Entities and Family Collaborations

16. You will need to reconfirm these relationships as part of you annual. You do this by using the pulldown box relationships is indicated next to each **Outside Entity or Family Collaboration for each project**.

	review	entity	related
		New Outside Entity or Family Collaboration Apply to all:	select ▾
1	View Entity Edit History	Lobo Louie	No Known Relations! ▾
2	View Entity Edit History	Lobo Corp	No Known Relations! ▾
3	View Entity Edit History	Lobo Louie	No Known Relations! ▾
4	View Entity Edit History	International Bioenergy	Relationship Identifie ▾
5	View Entity Edit History	LoboBiome	Relationship Identifie ▾
Show	Proposal	276	Comparing the Relationship Identified Approved

17. If you need to add a new **Outside Entity or Family Collaboration**.

- a. From within a project window, select **New Outside Entity or Family Collaboration**.

	review	Entity	related
		New Outside Entity or Family Collaboration Apply to all:	Select
1	View Entity Edit History	Lobo Louie	No Known Relations!
2	View Entity Edit History	Lobo Corp	No Known Relations!
3	View Entity Edit History	Lobo Louie	No Known Relations!
4	View Entity Edit History	International Bioenergy	Relationship Identified
5	View Entity Edit History	LoboBiome	Relationship Identified
Show	Proposal	276	Comparing the Relationship Identified Approved

- b. This will take you to enter a new **Outside Entity or Family Collaboration**.
- c. Upon completion of the Outside Entity or Family Collaboration, you should be returned to the disclosure. Identify the relationship to this new entity.
- d. You will have to define a relationship for each of your other projects as well.

18. SAVE

19. Repeat steps 10-16 for any remaining projects.

20. SAVE

21. Complete the **Certification** by clicking on the box and clicking **Submit**.

Certification

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.

Certification - Not yet certified

In submitting this disclosure, I certify that the information provided is true to the best of my knowledge.

Lobo Lucy N/A [Submit](#) [Print](#)

Reporter Certification Date

22. Errors

The Annual disclosure is the one most likely to result in an error message. Here are the types of errors that are most common. If you go to "Data Validation" on the front of the disclosure, it will tell you what is in error and you might be able to fix it by clicking "Fix". Note we have not had luck with this if the error is in a project disclosure embedded in the Disclosed Projects Section. If clicking "Fix" does not take you to the error, here is a list of the most common errors in the Annual Disclosure.

- A. You have added a new **Outside Entity or Financial Collaboration** during the year and not associated it with all your projects.

Disclosed Projects

Validation Errors found in this Section:

- Outside Entity or Family Collaboration Relationship is required.
- Outside Entity or Family Collaboration Relationship is required.
- Outside Entity or Family Collaboration Relationship is required.
- Outside Entity or Family Collaboration Relationship is required.
- Outside Entity or Family Collaboration Relationship is required.
- Outside Entity or Family Collaboration Relationship is required.

Disclosed Projects (Grouped by Projects) ? Group by Projects Group by Outside Entity or Family C

- a. Open the **Disclosed projects** tab and select **“Show”** next to **“Outside Interests and Family Collaborations”** for each **Project**.

Proposal Number: 282 ?
Disposition: Relationship Identified

Proposal Title: Biocomposting of zoological waste for onsite bioenergy production Sponsor: Department of Energy
Start Date: 2022-10-01 End Date: 2024-09-30 PI Name: Lobo Lucy

Show COI Project Disclosure (Complete)
Hide Outside Entities and Family Collaborations

Review	Entity	Related
	New Outside Entity or Family Collaboration apply to all:	select ?
View Entity Edit History	Lobo Louie	select
View Entity Edit History	Lobo Corp	select
View Entity Edit History	Lobo Louie	select
View Entity Edit History	International Bioenergy	Relationship Identified
View Entity Edit History	LoboBiome	Relationship Identified

- b. Select the relationship for the new entity on each project.
c. A hint- the number of times this error is repeated is the number of project disclosures that need updating.

B. There has been a change made to the published **Project Disclosure** that needs to be updated on your **Annual Disclosure**.

Newer version of COI Project Disclosure has been published, please update.	Fix
Newer version of COI Project Disclosure has been published, please update.	Fix
Newer version of COI Project Disclosure has been published, please update.	Fix
Newer version of COI Project Disclosure h Microsoft Excel ise update.	Fix

- C. You have not completed either the **Screening Questionnaire** or the **Annual Disclosure Questionnaire**.

▼ **Questionnaire**

Validation Errors found in this Section:

- COI Annual Disclosure is a mandatory questionnaire and is not complete.

▼ **Screening Questionnaire**

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Validation Errors found in this Section:

- Financial Entities Screening is a mandatory questionnaire and is not complete.

[Hide](#) Financial Entities Screening (Incomplete)

To fix these, complete the questionnaires.

- D. You have imported project questionnaires that were not completed.
- Return to the **Disclosed projects** panel.
 - Find the project for which the disclosure says incomplete.

[Proposal Number:](#) [REDACTED]

Disposition: Conflict Managed

Institutional Proposal Title: Advanced Computing for Defense Applications Sponsor: [REDACTED]

Start Date: [REDACTED] End Date: [REDACTED] PI Name: [REDACTED]

[Show](#) [COI Project Disclosure \(Incomplete\)](#)

[Show](#) [Outside Employment/Consulting/Other Collaborations](#)

- Click on **Show** next to the incomplete disclosure to complete the project disclosure.
- Certify.