

Tip Sheet: How to Enter a New Family Collaboration

1. In the **Conflict of Interest** menu, select “**Outside Entity or Family Collaboration**” by clicking on the plus next to it.



2. Under **Outside Entity or Family Collaboration Details**, enter the person’s name as the **Entity Name** and complete the address information for the person with whom you are collaborating.

The screenshot shows the 'Outside Entity or Family Collaboration Details' form. The fields are as follows:

* Entity Name : Lobo Louie	* Entity Type : Family Collaboration
Sponsor Code : [Search Icon] [Trash Icon]	* Status Code : Active
* Address Line 1 : 1234 Lobo Lane	State : NEW MEXICO
Address Line 2 : [Empty Field]	* Country Code : United States
Address Line 3 : [Empty Field]	* Postal Code : 87108
* City : Albuquerque	Website : [Empty Field]

3. Select "Family Collaboration" under Entity Type.

The image shows a screenshot of a web form titled "Organization Details" with a dark red header. A dropdown menu is open, displaying a list of entity types. The first option, "Family Collaboration", is highlighted with a blue bar and a checkmark. The other options are: US State/Local Government, US Private-For Profit, US Public-For Profit, US Private-Non Profit, US Public-Non Profit, Foreign Federal Government, Foreign State/Local Government, Foreign Private For-profit, Foreign Public For-profit, Foreign Private Nonprofit, Foreign Public Nonprofit, US Federal Government, US Public-Educational/Research Institution, US Private- Educational/Research Institution, US Non Governmental Agency, Foreign Educational/Research Institution, and Foreign Non Governmental Agency. To the left of the dropdown, there are three empty input fields.

4. Select "Active" under Status Code. This is easy to miss but it will cause an error message when you submit, if you do.

The image shows a screenshot of a web form with two main sections. The first section has a label "* Entity Name :" followed by a text input field containing "Lobo Louie". Below this is a label "Sponsor Code :" followed by an empty input field with a magnifying glass icon and a trash icon. The second section has a label "* Entity Type :" followed by a dropdown menu showing "Family Collaboration". Below the dropdown menu is a smaller dropdown menu for "Status Code :". This menu is open, showing three options: "select", "Active" (highlighted with a blue bar and a checkmark), and "Inactive".

5. IGNORE **Sponsor Code**.

6. The next section is the QUESTIONNAIRE. This is where you enter the details of how you interact with your family member. Select “Familial Collaboration” under the question “What are you reporting?”. This will trigger a specific set of questions to report the collaboration.

The screenshot shows a web interface for a questionnaire. At the top, there is a red header with a dropdown arrow and the text "Questionnaire". Below this is a grey bar with a "Hide" button and the text "Outside Entity Required Questions (Incomplete)". Underneath is another grey bar with "Questions" and a "Print" button. The main content area has a question "What are you reporting?". To the right of the question is a dropdown menu with a blue highlight on the "Familial Collaboration" option. Other visible options are "Select" (with a checkmark) and "Outside interest".

7. Answer the next 3 questions. Be as complete as possible so that the COI Committee can get a complete picture and avoid follow up emails from the COI office.

The screenshot displays three questionnaire questions, each with a text input field and a character count. Question 2 asks to identify family members and relationships, with the input "Lobo Louie, Spouse" and a count of "18 of 50". Question 3 asks to describe research areas, with the input "I study the intestinal microbiomes of Mexican Grey Wolves. Louie studies metabolic markers of Mexican Grey Wolf health" and a count of "120 of 5000". Question 4 asks to explain the role of family members, with the input "We collaborate on projects regarding the health of Mexican Grey Wolves based on diet, captivity state, and other environmental conditions" and a count of "137 of 5000". Each question has a "More Information..." link.

8. Select the proper answer regarding whether you have supervisory roles over one another.

The screenshot shows a single questionnaire question: "5. Do you have supervisory roles over each other in regard your projects?". Below the question are two radio button options: "Yes" and "No".

9. If you do, answer the question that pops up in response.

5a. Describe the supervisory role(s) and specify the direction of the supervision.

Each of us serves as PI on different projects. The direction depends on PI.



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You will be able to explain further in different projects (which should indicate who is the PI, etc).

10. Ignore **relationship details**, **notes** and **attachments** (unless you are later asked to fill them out).

11. Click **SAVE** at the bottom.

12. The new menu looks like this. Click **Submit** at the bottom



13. If there are no errors, you should see the following screen:

Holding Page

The document is being processed.
You will be returned to the document once processing is complete.
You can also return to the Action List by clicking below.

[Return to Action List](#)

14. You should then be directed back to your **Family Collaboration**, where you can review it and make any changes save it. This **Family Collaboration** will be available in all COI disclosures, where you can report relationships with it.

15. Errors in Family Collaborations

If there is an error, instead of the holding page, you will be returned to you Family Collaboration (which will have been saved) and the following will appear at the bottom.

Submit Save Reload Close

Errors found in this Section:

- Validation errors exist. Please correct these errors prior to submitting to workflow routing.

And this will appear at the top:

1 error(s) found on page. ×

• Document was successfully saved. ×

For Family Collaborations, the most common errors are

- a. Failure to select “Status Code” in the “Outside Entity and Family Collaboration Details” section.

* Status Code :

select ▾

- b. An incomplete Outside Entities Questionnaire – Screen shot to be fixed?



Correct these errors **SAVE** and submit again!