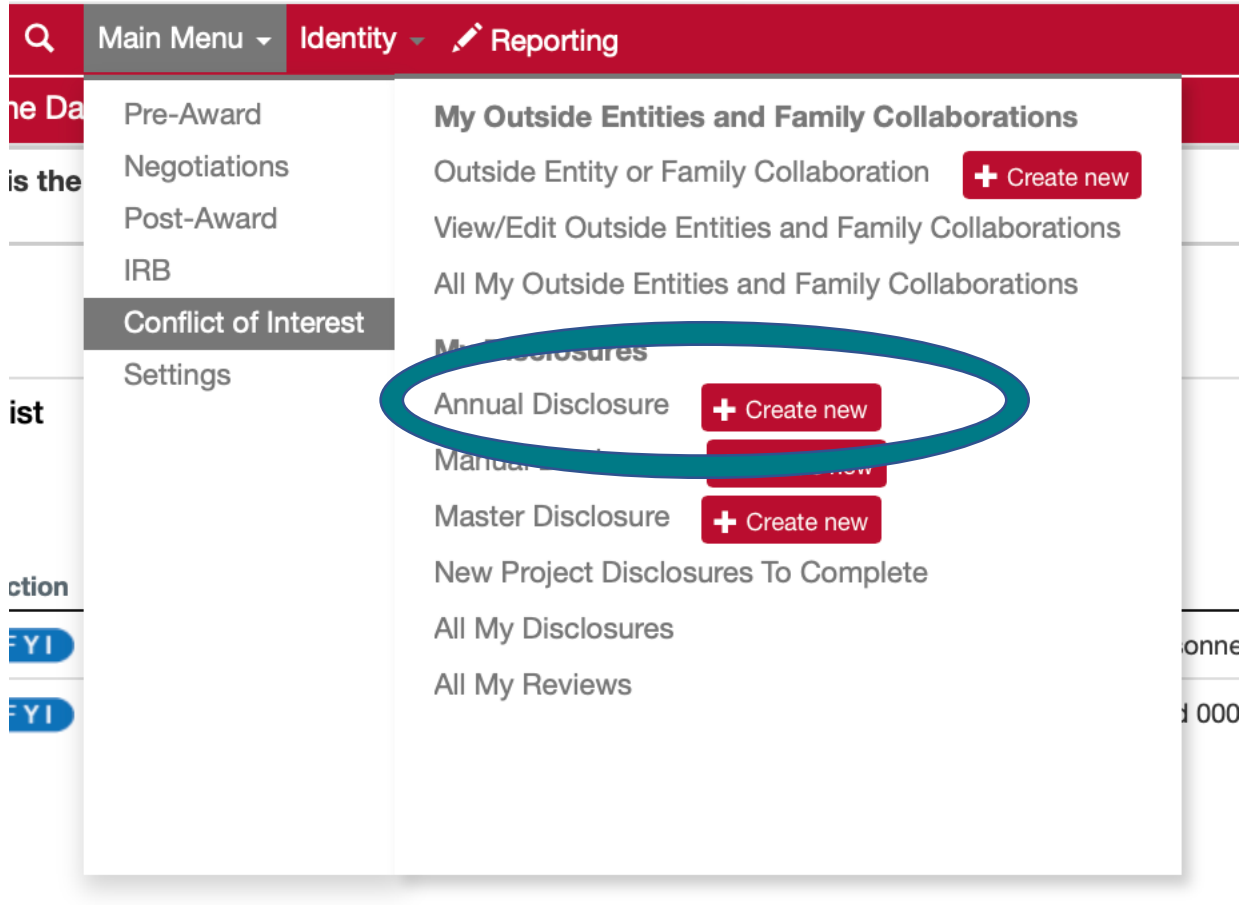# Tipsheet for Completing or Updating Annual Disclosures

1. From menu, click on "**+ Create New**" next to the Annual Disclosure.

2. Click the "**>**" next to the Screening Questionnaire tab.

3. Click on Show

Screening Questionnaire

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.

Show   Fin. Entities and Family Collaborations Screening (Incomplete)

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

Send Notification   Save   Reload   Close   Cancel

6. Click on the "**>"** next to the Questionnaire Tab.

> Questionnaire

7. Click on Show to complete the COI Annual Disclosure.

Questionnaire

Show   COI Annual Disclosure (Incomplete)

8. **SAVE**
9. 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.

> Disclosed Projects

10. 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

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

Proposal Number: ▮▮▮▮▮ ⑦

Disposition: Conflict Managed

Institutional Proposal Title: Advanced Computing for Defense Applications		Sponsor: ▮▮▮▮▮▮
Start Date: ▮▮▮	End Date: ▮▮▮	PI Name: ▮▮▮

Show	COI Project Disclosure (Incomplete)
Show	Outside Entities and Family Collaborations

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

Show	COI Project Disclosure (Complete)

13. If it is not click Show and complete it.

14. Next click Show next to Outside Entities and Family Collaborations.
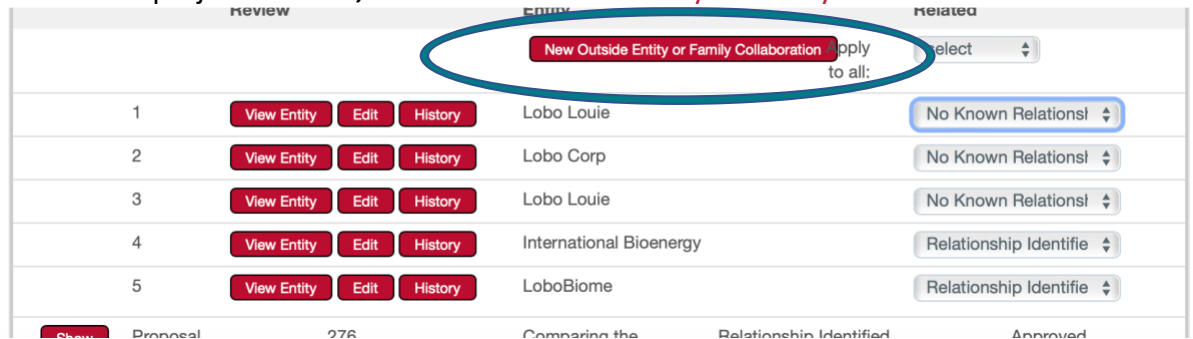
Show	Outside Entities and Family Collaborations

15. 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 Relationsh
2	View Entity	Edit	History	Lobo Corp	No Known Relationsh
3	View Entity	Edit	History	Lobo Louie	No Known Relationsh
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

16. 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.

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.

17. SAVE

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

19. SAVE

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

21. 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] pply to all:	[select ▲▼]
1	[View Entity] [Edit] [History]			Lobo Louie	✓ select
2	[View Entity] [Edit] [History]			Lobo Corp	No Known Relationship
3	[View Entity] [Edit] [History]			Lobo Louie	Potential Relationship
4	[View Entity] [Edit] [History]			International Bioenergy	Relationship Identified
5	[View Entity] [Edit] [History]			LoboBiome	[Relationship Identifie ▲▼]

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 se update.	[Fix]

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

To fix these, complete the questionnaires.

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

c. Click on Show next to the incomplete disclosure to complete the project disclosure.
d. Certify.