

How to Complete the Conflict of Interest Disclosure Form

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Office of Regulatory Compliance
UNIVERSITY OF COLORADO DENVER | ANSCHUTZ MEDICAL CAMPUS

QUICK GUIDE

(These are quick, high-level directions. For more detailed directions, skip to the next page of this document.)

1. In your internet browser (recommended: Chrome or Firefox), please navigate to <https://era.cu.edu>.
2. Select "Denver" or "Anschutz" from the drop-down.
3. Login with your CU Denver/Anschutz username and password.
4. Click on "Conflict of Interest" (left side of the screen).
5. Click on "Create/Update Disclosure."
6. Click on the new disclosure button as noted below:
 - "Recertify or Update Disclosure" if you have submitted disclosure previously.
 - "Edit/Submit Current Disclosure" if you started but did not complete a disclosure.
 - "Create Initial Disclosure" if you have never submitted a disclosure.

The screenshot shows the top portion of the COI Disclosure Form. At the top left is a "Save" button. To its right is a box containing "Section-specific instructions". Further right is a "Completed" box. Below the "Save" button is a "Navigation Pane" showing a list of sections: 1. Introduction, 2. Training, 3. Questionnaire, A. Relationships (2), and 4. Certification. A green checkmark is next to "1. Introduction". Below the navigation pane is a "Completed section" box. To the right of the "Completed section" box is a red box containing "INSTRUCTIONS: 1) Review this section. 2) Complete the quiz. 3) Click 'Save' (top, left corner of the screen). 4) Check the 'Completed' box (top, right corner of the screen). 5) Using the navigation pane (the top, left corner of the screen), move to the '3. Questionnaire' section. OR Click here to view detailed instructions on how to complete this section." Below the instructions box is the title "Section 2: Training and Education".

7. Refer to the **section-specific instructions** to guide you through completing the COI Disclosure Form. The following are basic principles to keep in mind:
 - Answer every question.
 - Save frequently using the **"Save" button** (top, left corner of the screen).
 - In every section, check the **"Completed" box** (top, right corner of the screen).
 - A **completed section** will have a green check mark over the associated folder icon: 
 - To move through the COI Disclosure Form, use the **"Navigation Pane"** (top, left corner of the screen). Click on the name of the section, not the folder icon.

➤ **Still need help with filling out the COI Disclosure Form? Review the ["Detailed Instructions"](#) portion of this document or the ["FAQs."](#)**

SPECIAL NOTE FOR THOSE WHO HAVE PREVIOUSLY DONE A COI DISCLOSURE FORM

If you have previously filed a COI Disclosure Form:

- The majority of the information you supplied in your last COI Disclosure Form will automatically populate your new COI Disclosure Form.
- It is imperative that you review and update previously disclosed information to ensure accurate and current disclosure.

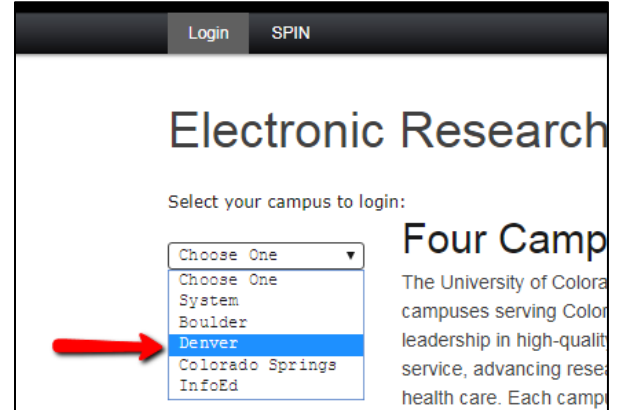
DETAILED INSTRUCTIONS

Accessing the COI Disclosure Form

Logging In

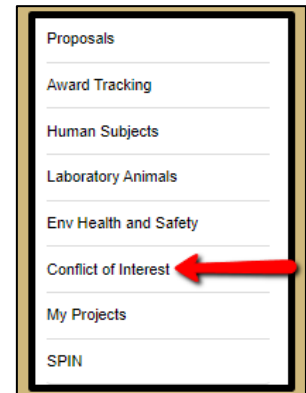
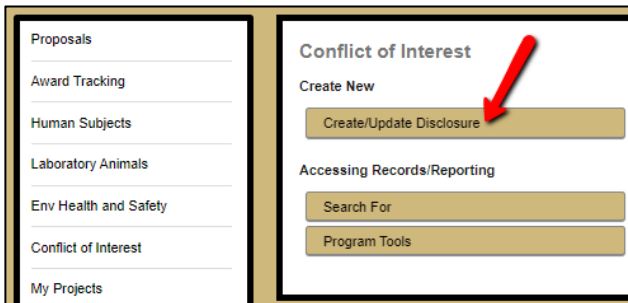
- In your internet browser, navigate to era.cu.edu.
- Select “Denver” or “Anschutz” from the dropdown.
- Use your CU Denver/Anschutz username and password to login.

➤ Login troubles? Visit the [“FAQs”](#) at the end of this document.

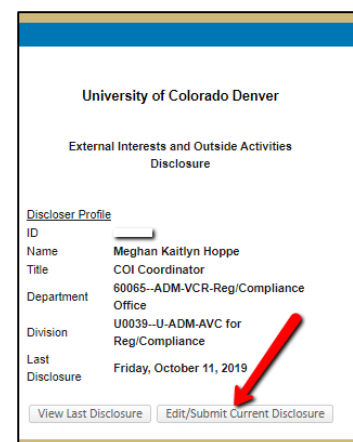


Navigating to the COI Disclosure Form within InfoEd

- Click on the “Conflict of Interest” module, which is on the left side of the screen.
- Click on “Create/Update Disclosure.”



- Enter the COI Disclosure Form by clicking on the new disclosure button as noted below:
 - “Recertify or Update Disclosure” if you have submitted disclosure previously.
 - “Edit/Submit Current Disclosure” if you started but did not complete a disclosure.
 - “Create Initial Disclosure” if you have never submitted a disclosure.



NOTE:

The screenshots provided in this document are *examples*. They may not exactly reflect the appearance of every individual’s COI Disclosure Form.

Questions? Email coi@cuanschutz.edu.

Section-by-Section Instructions

NOTE:

The screenshots provided in this document are *examples*. They may not exactly reflect the appearance of every individual's COI Disclosure Form.

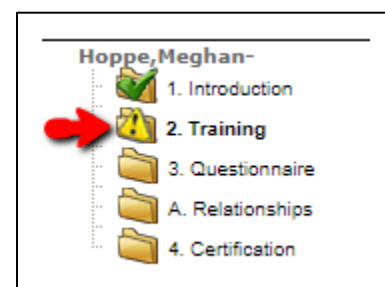
Section “1. Introduction”

- Read the section.
- Answer and/or update all questions.
- Click the “Save” button (top, left corner of the screen).
- Check the “Completed” box (top, right corner of the screen).
- Within the Navigation Pane (top, left corner of the screen) click on 2. *Training*.



Section “2. Training”

- Read the section.
- Complete the “Required Training Quiz” at the bottom of the page.
Note: This must be completed once every year.
- Click the “Save” button (top, left corner of the screen).
- Check the “Completed” box (top, right corner of the screen).
- Within the Navigation Pane (top, left corner of the screen) click on 3. *Questionnaire*.



Section “3. Questionnaire”

- Answer and/or update all questions.
- Click the “Save” button (top, left corner of the page).



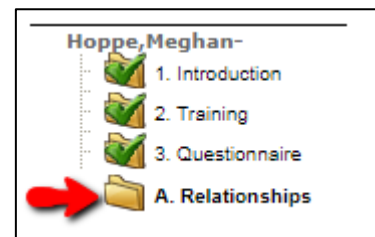
- Check the “Completed” box (top, right corner of the screen).

PLEASE NOTE:

- If you answered “No” to questions 1-4 in 3. Questionnaire, please skip to [page 9](#), which contains instructions about the 4. Certification section.
- If you answered “Yes” to one or more of questions 1-4 in 3. Questionnaire, please proceed to the instructions about A. Relationship [below](#).

Section “A. Relationships” (if applicable)

Don't have a section called A. Relationships? That's OK. Please skip to 4. Certification; instructions are on [page 9](#) of this document.



Update a Previously Disclosed Relationship

Note: To ensure the accuracy of your disclosure, it is imperative that you review and update information about previously disclosed relationships.

1. From the *A. Relationships* page, click on the name of the relationship you wish to update.

| Entity Name | Completed | Delete |
|-------------|-----------|--------|
| Pfizer, Inc | | |

2. The system will move you to the *Relationship Details* page that is devoted to the relationship that you wish to update.
3. Review and update the information that you previously disclosed in the applicable *Relationship Details* page.
 - *Instructions about how to complete the Relationship Details section are on [page 8](#) of this document.*
4. Check the “Completed” box (top, right corner of the screen) on the *Relationship Details* page.
5. Return to the *A. Relationships* page—
 - a. If you have another relationship to previously disclosed update, please repeat Steps 1-4 as needed until you have entered all relationships.
 - b. For information on how to add a relationship, please see [page 6](#) of this document.
 - c. For information on how to remove a previously disclosed relationship, please see [page 7](#) of this document.
 - d. If you have no other relationships to disclose, please skip to Step 6 below.
6. Once you have updated your outside relationship(s), click the “Save” button (top, left corner of the screen).
7. Check the “Completed” box (top, right corner of the screen) for *A. Relationships*.

Continued from previous page: Section “A. Relationships” (if applicable)

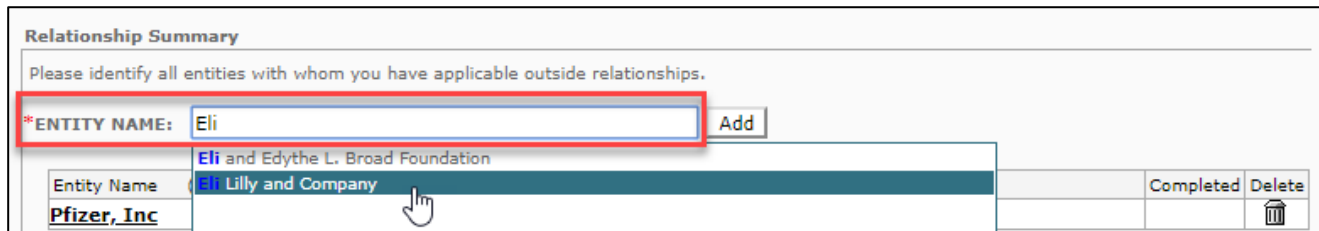
Don't have a section called A. Relationships? That's OK. Please skip to 4. Certification; instructions are on [page 9](#) of this document.



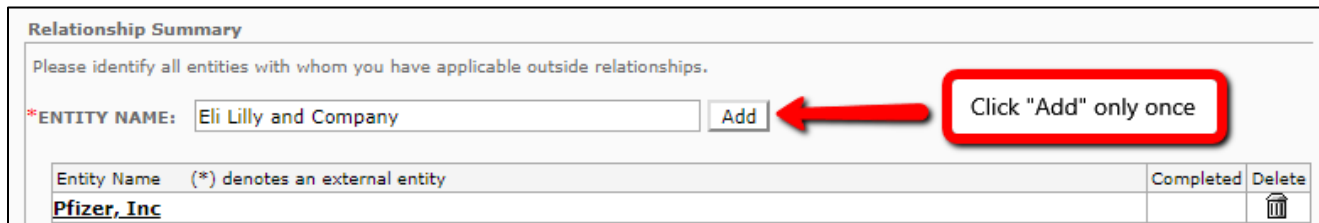
Add a New Relationship

1. From the *A. Relationships* page in the “ENTITY NAME” box, begin typing the name of ONE entity with which you have a relationship. Either select the correct entity from the dropdown or manually enter* the entity.

NOTE: you can still add an entity name that isn't in the dropdown.



2. Once the correct entity's name is displayed in the field, click the “Add” button. Only click “Add” ONCE.



3. The system will move you to the *Relationship Details* page that is devoted to the relationship that you wish to update.
4. Complete the *Relationship Details* page.
 - Instructions about how to complete the Relationship Details section are on [page 8](#) of this document.
5. Check the “Completed” box (top, right corner of the screen) on the *Relationship Details* page.
6. Return to the *A. Relationships* page—
 - a. If you have another relationship to add, please repeat Steps 1-4 as needed until you have entered all relationships.
 - b. For information on how to remove a previously disclosed relationship, please see [page 7](#) of this document.
 - c. For information on how to update a previously disclosed relationship, please see [page 5](#) of this document.
 - d. If you have no other relationships to disclose, please skip to Step 7 below.
7. Once you have updated your outside relationship(s), click the “Save” button (top, left corner of the screen).
8. Check the “Completed” box (top, right corner of the screen) for *A. Relationships*.

Continued from previous page: Section “A. Relationships” (if applicable)

Don't have a section called A. Relationships? That's OK. Please skip to 4. Certification; instructions are on [page 9](#) of this document.






Remove a Previously Disclosed Relationship

1. From the “Entity Name” box on the *A. Relationships* page, identify the relationship that you wish to delete.
2. Click on the trashcan icon that is to the right of the relationship that you want to delete.

Relationship Summary

Please identify all entities with whom you have applicable outside relationships.

*ENTITY NAME:

| Entity Name (*) denotes an external entity | Completed | Delete |
|---|-----------|---|
| Alexion Pharmaceuticals, Inc. | |  |
| Eli Lilly and Company | |  |
| Pfizer, Inc | |  |




3. Click “OK” in the dialog box that appears (see below).

era.cu.edu says

Delete this item?

4. Allow the system to complete the action (see below).

Please do not close this window until the operation has finished.

| Entity Name (*) denotes an external entity | Completed | Delete |
|---|-----------|---|
| Alexion Pharmaceuticals, Inc. | |  |
| Eli Lilly and Company | |  |
| Pfizer, Inc | |  |

Remember – you do NOT need to disclose the following as an outside relationship:

5. Continue updating the *A. Relationships* page—
 - a. If you have another relationship to remove, please repeat Steps 1-2 as needed until you have entered all relationships.
 - b. For information on how to add a relationship, please see [page 6](#) of this document.
 - c. For information on how to update a relationship, please see [page 5](#) of this document.
 - d. If you have no other relationships to disclose, please skip to Step 6 below.
6. Once you have updated your outside relationship(s), click the “Save” button (top, left corner of the screen).
7. Check the “Completed” box (top, right corner of the screen) for *A. Relationships*.

Section “Relationship Details” (if applicable)

(This is a subsection of A. Relationships. Please use this section to provide detailed and accurate information about the applicable relationship.)

The screenshot shows a sidebar on the left with a tree view containing: 'Hoppe, Meghan-' (with a checkmark), '1. Introduction' (with a checkmark), '2. Training' (with a checkmark), '3. Questionnaire' (with a checkmark), 'A. Relationships' (with a folder icon), 'Pfizer, Inc' (with a folder icon and a red arrow pointing to it), and '4. Certification' (with a folder icon). The main content area on the right has a red-bordered box at the top labeled 'Relationship Details'. Below this box, the text 'University of Colorado Der' and 'Pfizer, Inc' is visible.

- Answer and/or update all questions contained on the *Relationship Details* page.

To learn how to add, and/or remove an activity/interest under a given relationship, please skip to [page 12](#) of this document.

SPECIAL NOTE FOR THOSE WHO HAVE *PREVIOUSLY* DONE A COI DISCLOSURE FORM

If you have previously filed a COI Disclosure Form:

- The majority of the information you supplied in your last COI Disclosure Form will automatically be populated into your new COI Disclosure Form.
- It is imperative that you review and update this information to ensure accurate and current disclosure.

- Click the “Save” button (top, left corner of the page).

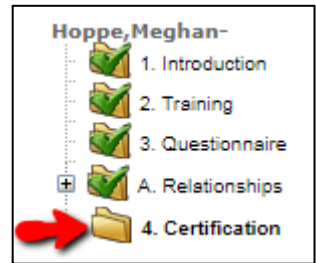
The screenshot shows the top navigation bar with buttons: 'Done', 'Back', 'Save' (with a red arrow pointing to it), and 'Show'. Below the navigation bar is the same sidebar as in the previous screenshot, showing the tree view with 'Pfizer, Inc' highlighted by a red arrow.

- Check the “Completed” box (top, right corner of the screen).
- Return to the *A. Relationships* section.
 - You’ll find instructions about how to complete the *A. Relationships* section starting on [page 5](#) of this document.

The screenshot shows the sidebar with the tree view. A red arrow points to the 'A. Relationships' folder icon. Below it, the 'Pfizer, Inc' folder icon is visible, and further down is the '4. Certification' folder icon.

Section “4. Certification”

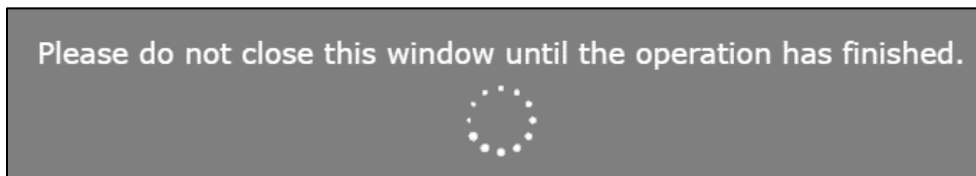
- Read the section.



- Click the “Save” button (top, left corner of the screen).
- Check the “Completed” box, which is in the top, right corner of the page.

| | | |
|---|------------------------------------|--------|
| 4. Certification | Completed <input type="checkbox"/> | Submit |
| University of Colorado Denver Anschutz Medical Campus Conflict of Interest and Commitment Disclosure Form | | |

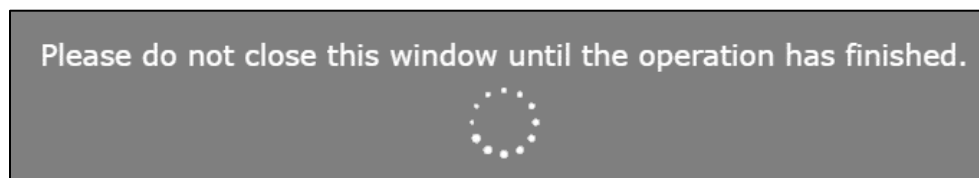
- Wait for the form to save and reload.




- Click the “Submit” button, which is in the top, right corner of the page.

| | | |
|---|---|--------|
| 4. Certification | Completed <input checked="" type="checkbox"/> | Submit |
| University of Colorado Denver Anschutz Medical Campus Conflict of Interest and Commitment Disclosure Form | | |

- Wait for the form to submit and reload.



- Check to ensure that the form submitted. The “Submitted Date” timestamp and PDF icon indicate that the COI Disclosure has been submitted successfully.

| | | |
|---|---|---|
| 4. Certification | Completed <input checked="" type="checkbox"/> | Submitted Date: 07-Aug-2019 10:55:00 AM  |
| University of Colorado Denver Anschutz Medical Campus Conflict of Interest and Commitment Disclosure Form | | |

FAQs

| | |
|---|----|
| What do I do if I'm not a CU Denver/Anschutz employee and I'm new to InfoEd? | 10 |
| I have a CU Denver/Anschutz username and password. Why can't I login to InfoEd? | 10 |
| How do I change my CU Denver/Anschutz password? | 11 |
| I'm having trouble moving through the COI Disclosure Form. What's wrong? | 11 |
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What do I do if I'm not a CU Denver/Anschutz employee and I'm new to InfoEd?

- In order to access the COI Disclosure Form, you will need to acquire a CU Denver/Anschutz username and password.
- To do that, please request a Person of Interest (POI) number by filling out the form that can be found by clicking [HERE](#).

I have a CU Denver/Anschutz username/password. Why can't I login to InfoEd?

- Verify that you are at the correct URL: era.cu.edu.
- Select "Denver" or "Anschutz" from the drop down.
- Verify that you are using the correct username. CU Denver/Anschutz usernames are typically last name and first initial without spaces. For example, John Smith's username would likely be "smithj."
- Consider that your password may have expired. For security purposes, CU Denver/Anschutz passwords expire every ninety (90) days. If you are experiencing login difficulties, please contact the CU Denver/Anschutz Information Technology Help Desk (303-724-4357) to change your password.
- If you are a Person of Interest (POI), your POI sponsorship may have expired. Please contact the eRA Access team by emailing eRASupport@cuanschutz.edu or calling 303-724-0459.

How do I change my CU Denver/Anschutz password?

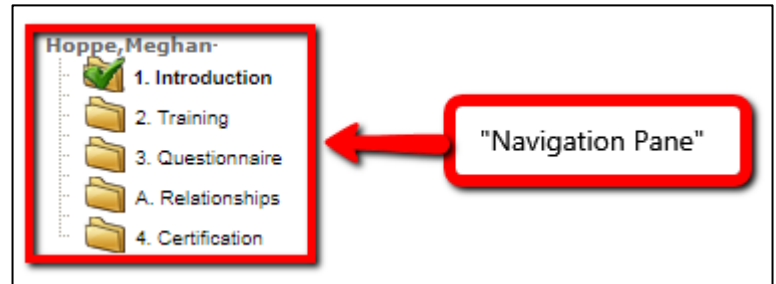
Please contact the CU Denver/Anschutz Information Technology Help Desk (303-724-4357) or go to the [Password Reset Page](#) to change your password.

Questions? Email coi@cuanschutz.edu.

I'm having trouble moving through the COI Disclosure Form. What's wrong?

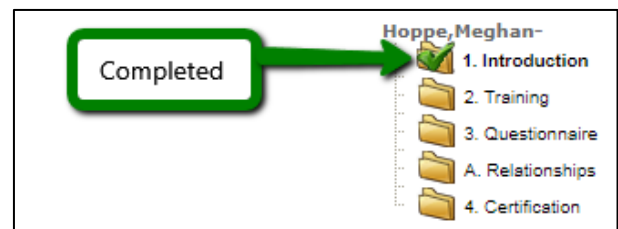
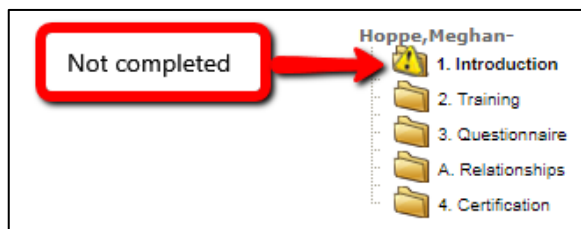
To move through the COI Disclosure Form, use the Navigation Pane, which is located in the top, left corner of the form). Click on the name of the section, not the folder icon.

If you still can't move to the next page, try opening a private window in your browser (for instructions, click [HERE](#)) and return to your COI Disclosure Form as you had done before.



How do I keep track of what sections I've completed?

Once you've marked a section "Completed," the folder for that section within the Navigation Pane will have a green check mark.

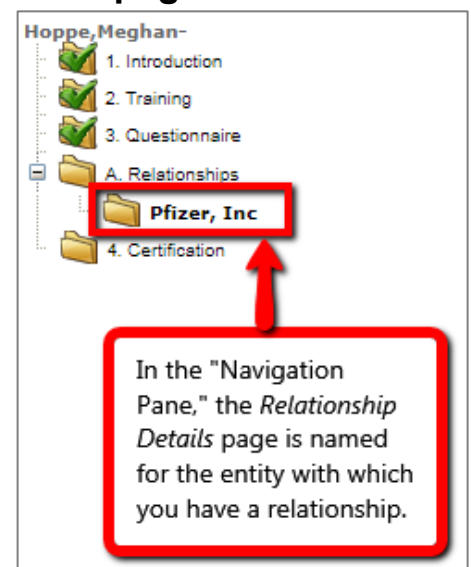


Why won't the COI Disclosure Form let me check the "Completed" box in a section?

Verify that you answered all questions in the section. Click "Save" (top, left corner). If you can't find the one you're missing, try checking the "Completed" box again; a dialog box will appear and give you a hint of what question is missing an answer. Answer the question and check the "Completed" box again.

How can I navigate directly to a specific Relationship Details page?

- Within the Navigation Pane, click on the plus sign (+) that is to the left of *A. Relationships*.
- This will reveal a list of the *Relationship Details* pages, which are named for each given entity.
- Click on the name of the entity to go to the applicable *Relationship Details* page.



How do I make a change to a section that I've already completed?


Once you've marked a section "Completed," you cannot edit the information in that section.

Use the Navigation Pane to go to the section you need to change. If you need to change or update a "Completed" section, simply un-check the "Completed" box, which is in the top, right corner of the page. Make your desired change, click "Save" (top, left corner), and re-check the "Completed" box.

How do I disclose more than one activity (e.g., speaker and consultant) for a given entity?

- Navigate to the *Relationship Details* page for the entity for which you want to add an additional activity/interest.
 - For help navigating to a specific Relationship Details section, please return to [page 11](#) of this document.
- Locate the table under question 2.
- Click on the "Add Activity/Interest" button (see screenshot below).



2. For this company, organization or entity indicated in Question 1 above, in which you or a family member have a personal financial interest (receive outside income or have stock, equity or ownership interests) or participate on a Board of Directors as identified in the previous section, please answer the following questions.

| Who has the activity and/or external interest? | What is the type of activity? | Approx. number of days devoted to this activity? (past 12 months) | Approx. number of days devoted to this activity? (next 12 months) | What is the type of external interest? | What is the value of the financial interest? (past 12 months) | What is the value of the financial interest? (next 12 months) | Delete |
|--|-------------------------------|---|---|--|---|---|---|
| Self | Consultant | 1.00 | 1.00 | Consulting Fees | 0-4,999 | 0-4,999 |  |

Add Activity/Interest

- The COI Disclosure Form will provide an additional line that you can use to disclose the additional connection (see screenshot below).
 - For more information about the Relationship Details section, please return to [page 8](#) of this document.

2. For this company, organization or entity indicated in Question 1 above, in which you or a family member have a personal financial interest (receive outside income or have stock, equity or ownership interests) or participate on a Board of Directors as identified in the previous section, please answer the following questions.



| Who has the activity and/or external interest? | What is the type of activity? | Approx. number of days devoted to this activity? (past 12 months) | Approx. number of days devoted to this activity? (next 12 months) | What is the type of external interest? | What is the value of the financial interest? (past 12 months) | What is the value of the financial interest? (next 12 months) | Delete |
|--|-------------------------------|---|---|--|---|---|---|
| Self | Consultant | 1.00 | 1.00 | Consulting Fees | 0-4,999 | 0-4,999 |  |
| | | 0.00 | 0.00 | | | |  |

Add Activity/Interest

How do I remove an activity/interest under a relationship?

- Navigate to the *Relationship Details* page for the entity for which you want to add an additional connection.
 - For help navigating to a specific Relationship Details section, please see [page 11](#) of this document.
- Locate the table under question 2.
- Click on the applicable trashcan icon for the activity that you want to remove.

2. For this company, organization or entity indicated in Question 1 above, in which you or a family member have a personal financial interest (receive outside income or have stock, equity or ownership interests) or participate on a Board of Directors as identified in the previous section, please answer the following questions.

| Who has the activity and/or external interest? | What is the type of activity? | Approx. number of days devoted to this activity? (past 12 months) | Approx. number of days devoted to this activity? (next 12 months) | What is the type of external interest? | What is the value of the financial interest? (past 12 months) | What is the value of the financial interest? (next 12 months) | Delete |
|--|-------------------------------|---|---|--|---|---|---|
| Self | Consultant | 1.00 | 1.00 | Consulting Fees | 0-4,999 | 0-4,999 |  |
| Self | Speaker | 2.00 | 0.00 | Speaking Fees | 5,000-9,999 | 0-4,999 |  |

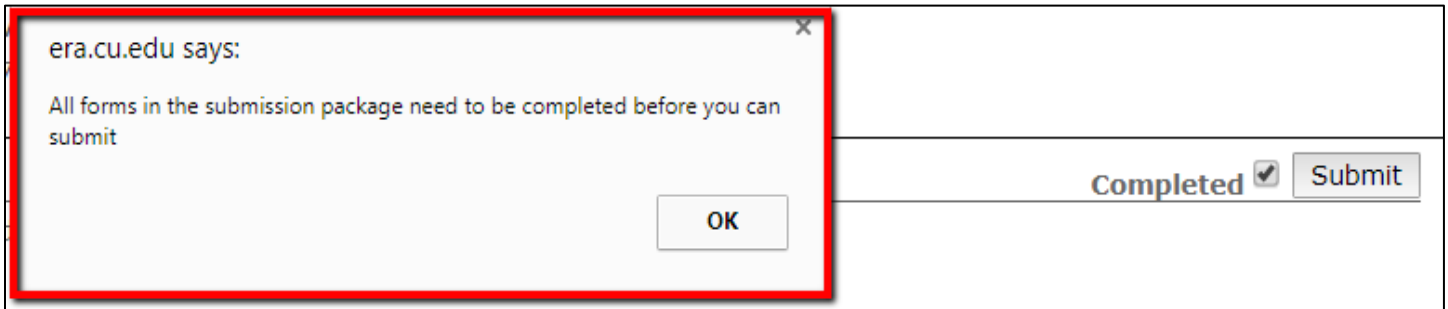
Add Activity/Interest

➤ For more information about the Relationship Details section, please return to [page 8](#) of this document.

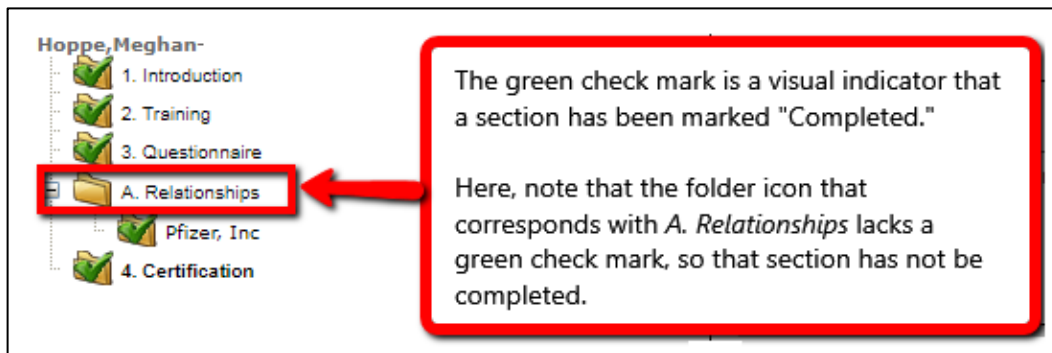
How do I disclose my reimbursed travel?

Reimbursed travel is disclosed by using a *separate* form from the COI Disclosure Form in InfoEd. You should not update and submit the COI Disclosure Form if you are *only* updating travel reimbursement. To complete your travel disclosure, please click [HERE](#).

Why do I keep getting an error message when I try to submit the COI Disclosure Form?



- The COI Disclosure Form will not submit until all sections have been completed.
- Look at the Navigation Pane (top, left corner).
- Verify that each folder icon has a green check mark over it; this indicates that the section has been completed.
 - Note: The most common section that is left uncompleted is *A. Relationships*.



- Once you have identified the un-completed section, click on the name of the section within the Navigation Pane.
- Click "Save" (top, left corner) and then check the "Completed" box for that section.
- Return to *4. Certification* to submit your COI Disclosure Form.

How do I know that my COI Disclosure Form was submitted?

1. Timestamp in the Disclosure Form

- Within the COI Disclosure Form, navigate to *4. Certification*.
- If your COI Disclosure Form was submitted, you will see a “Submitted Date” timestamp in the top, right corner of the page along with a PDF icon.



4. Certification Completed Submitted Date: 07-Aug-2017 3:19:35 PM

University of Colorado Denver Conflict of Interest and Commitment Disclosure Form

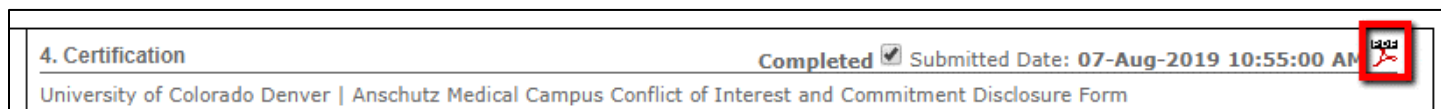
2. Receipt email

- COI Disclosure Forms that are successfully submitted are acknowledged by an email receipt.
- Typically, the receipt email is received an hour after submission, but it could take up to 24 hours to receive the receipt email.
- The receipt email will be sent to the email address that is saved in your InfoEd record.

How do I save my COI Disclosure Form for my own records?

Within your COI Disclosure Form,

1. Navigate to *4. Certification*.
2. Click on the PDF icon, which is located next to the “Submit Date” timestamp in the top, right corner of the screen.



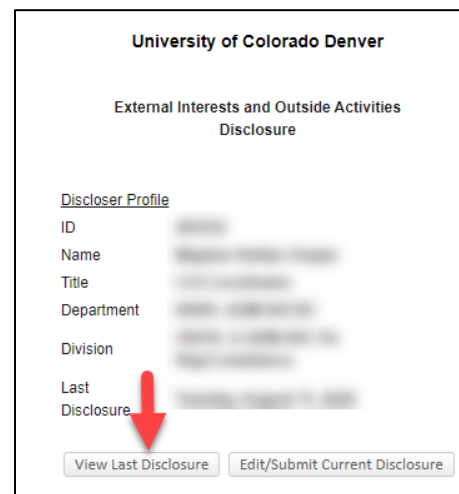
4. Certification Completed Submitted Date: 07-Aug-2019 10:55:00 AM

University of Colorado Denver | Anschutz Medical Campus Conflict of Interest and Commitment Disclosure Form

3. Once you have opened the PDF version of your COI Disclosure Form, you will be able to save the document in your chosen location.

Within InfoEd

1. Navigate to “Conflict of Interest.”
2. Click on “Create/Update Disclosure.”
3. Click “View Last Disclosure.”
4. Once you have opened the PDF version of your COI Disclosure Form, you will be able to save the document in your chosen location.



University of Colorado Denver

External Interests and Outside Activities Disclosure

Discloser Profile

ID

Name

Title

Department

Division

Last Disclosure

[View Last Disclosure](#) [Edit/Submit Current Disclosure](#)

Questions? Email coi@cuanschutz.edu.