VERAS AND YOU
SIGN ON TO THE SYSTEM

• Log into VERAS using Single Sign-On
SELECT CONFLICT OF INTEREST

• Select (click on) ‘Annual COI and Commitment Report Form for Individuals’ from the ‘Conflict of Interest Forms’ link (upper left corner of screen).
SELECT FORM CREATION TYPE

- Either create a new “Annual Form,” or a new “Project Form,” or click to edit a previously submitted form.
  - An Annual Form is the base form for listing all your current Significant Financial Interests (SFIs). The University requires that this form be created or revised annually.
  - A Project Form must be created and submitted for each sponsored project proposal that requires disclosure of SFIs.
  - Editing a previously submitted form allows you to add or delete previously reported SFIs.

- See the following slides for instructions:
  - Slide 5 for Annual Forms
  - Slide 15 for Project Forms
  - Slide 25 for Annual Form Revisions
  - Slide 35 for Project Form Revisions
CREATE NEW ANNUAL FORM

• To create a new Annual Form, select ‘Add a New Form’ (red circle).
IDENTIFY ANNUAL FORM

- Select Annual Form (red arrow), then select ‘Continue’ (red circle).
START NEW ANNUAL FORM

• Indicate this is a New Annual Disclosure (red arrow) then select ‘Continue’ (red circle).
SIGNIFICANT FINANCIAL INTEREST - DESCRIPTION

- Review the SFI definition.
DISCLOSE SIGNIFICANT FINANCIAL INTERESTS

- At the red arrow, select the correct option.
  - If you have an SFI, enter the requested information into folder ‘Entry 1’ (yellow arrow).
  - See next slide for guidance on entering ‘Company Name.’
  - Enter additional SFIs by clicking ‘Click here to add another entry’ (yellow arrow). See ‘Deleting a SFI’ slide to remove one.
  - Confirm that all SFIs have been entered (blue arrow).
  - Select ‘Continue.’ (red circle) to advance.
IDENTIFYING SOURCE OF FINANCIAL INTEREST

• When entering ‘Company Name’, spell out the full name, then select the highlighted name from the drop-down list. (red arrow).

• Do not use acronyms (for example, WSU). Acronyms are used to identify multiple institutions (for example, WSU can be Washington State University, Wayne State University or Wichita State University).

• If the company name you type does not appear on the drop-down menu, select ‘Please click here to enter’ (red circle) and the full name will appear at the yellow arrow.
DELETING A SFI

• Step 1, create a second entry by selecting the ‘Click here to add another entry’ (green arrow).

• Step 2, go back to entry 1 and select ‘Click here to delete this entry’ (red arrow).

• Confirm deletion by selecting ‘OK’ (red circle).
REVIEW AGREEMENT AND CERTIFICATION

• Once information for all SFIs has been entered, read the confirmation statement (red circle), then hit ‘Continue’ (red arrow) to submit the form.

• On the next page, click on ‘Signoff and Submit’ to successfully submit this annual form.

Your form is not submitted until you finish this step.
SAVE THE SIGNOFF

• Tick the box (red arrow) and click on ‘Save the signoff’ (red circle).
FOR FUTURE REFERENCE

• For future reference, note the date completed. In this case, 2/1/2017 at 5:54:30 pm PST, then select ‘Back’ (red circle). This will make it easier to identify this form in the future.
CREATE NEW PROJECT FORM

• Tick the checkbox associated with your annual form (red arrow). If multiple files are present, only the date of submission identifies your annual form file.

• If you do not remember the submission date of your most recent annual form, file content can be viewed by clicking the box in the ‘edit/view’ column (yellow arrow).

• Once the tick box checked is associated with the newest version of your annual form, click on ‘Copy Form’ (blue arrow).
IDENTIFY PROJECT FORM

• Click ‘OK’ (yellow arrow) to acknowledge that the form has been successfully copied. It can now be modified as needed.

• Change the tick box from the ‘Annual Form’ identifier to the ‘Project Form’ identifier (red arrow).

• Click on ‘Continue’ in the upper right hand corner of the screen (red circle) to advance.
START NEW PROJECT FORM

- Tick box to indicate ‘New Disclosure’ (red arrow).
- Enter project title and EIPRS number (yellow arrows).
- Identify project sponsor ‘type’ (blue arrow).
- Click ‘Continue’ (red circle) in the upper right hand corner of the screen.
SIGNIFICANT FINANCIAL INTEREST - DESCRIPTION

- Review the SFI definition.
DISCLOSE SIGNIFICANT FINANCIAL INTERESTS

- The SFI section (red arrows) is a copy of your annual form.
- All SFIs that are relevant to this project should already be listed.
- You do not need to change any part of the top section (top red arrow) unless you have an unrecorded SFI that occurred within the last 30 days.
• If you have relevant SFIs, please describe by providing the requested information (red arrow) for each SFI.
  – The next two slides address adding and removing SFIs.
• New SFIs can be added by clicking on ‘Click here to add another entry’.
• When SFI information is complete, select ‘Continue’ (red circle) to advance.
IDENTIFYING SOURCE OF FINANCIAL INTEREST

• When entering ‘Company Name’, spell out the full name, then select the highlighted name from the drop-down list. (red arrow).

• Do not use acronyms (for example, WSU). Acronyms are used to identify multiple institutions (for example, WSU can be Washington State University, Wayne State University or Wichita State University).

• If the company name you type does not appear on the drop-down menu, select ‘Please click here to enter’ (red circle) and the full name will appear at the yellow arrow.
DELETING A SFI

• Step 1, create a second entry by selecting the ‘Click here to add another entry’ (green arrow).

• Step 2, go back to entry 1 and select ‘Click here to delete this entry’ (red arrow).

• Confirm deletion by selecting ‘OK’ (red circle).
REVIEW AGREEMENT AND CERTIFICATION

• Once information for all SFIs has been entered, read the confirmation statement (red circle), then hit ‘Continue’ (red arrow) to submit the form.

• On the next page, click on ‘Signoff and Submit’ to successfully submit this annual form.

Your form is not submitted until you finish this step.
SAVE THE SIGNOFF

- Tick the box (red arrow) and click on ‘Save the signoff’ (red circle).
CREATE ANNUAL FORM REVISION

• If still at the Workflow- Submission Tracking screen, select ‘Back’ (red circle).

• Select the Annual Form (green circle) you wish to copy then ‘Copy Form’ (red arrow).
  – Click on ‘Edit/View’ (yellow arrow) to identify the form is unknown.
ANNUAL FORM PAGE WILL REMAIN THE SAME

• Select ‘Continue’ (red circle).
• Identify that this is a ‘Revision of prior disclosure’ (red arrow).
• Then select ‘Continue’ (red circle).
SIGNIFICANT FINANCIAL INTEREST - DESCRIPTION

- Review the SFI definition.
SFI(S) PREVIOUSLY DISCLOSED

- Modify the previously declared SFI(s) by adding or deleting as needed (see next slides for adding or deleting a SFI). Then click ‘Continue’ (red circle).
IDENTIFYING SOURCE OF FINANCIAL INTEREST

• When entering ‘Company Name’, spell out the full name, then select the highlighted name from the drop-down list. (red arrow).

• Do not use acronyms (for example, WSU). Acronyms are used to identify multiple institutions (for example, WSU can be Washington State University, Wayne State University or Wichita State University).

• If the company name you type does not appear on the drop-down menu, select ‘Please click here to enter’ (red circle) and the full name will appear at the yellow arrow.
DELETING A SFI

• Step 1, create a second entry by selecting the ‘Click here to add another entry’ (green arrow).

• Step 2, go back to entry 1 and select ‘Click here to delete this entry’ (red arrow).

• Confirm deletion by selecting ‘OK’ (red circle).
CONFIRMATION OF SFI(S)

• Confirm that you have listed all SFIs (yellow arrow)
• Identify if any of the modified SFIs affect previously submitted projects (red arrow)
  – If the SFIs do affect active projects, you will need to modify the appropriate project from.

• Select ‘Continue’ (red circle).
REVIEW AGREEMENT AND CERTIFICATION

• Once information for all SFIs has been entered, read the confirmation statement (red circle), then hit ‘Continue’ (red arrow) to submit the form.

• On the next page, click on ‘Signoff and Submit’ to successfully submit this annual form. Your form is not submitted until you finish this step.
SAVE THE SIGNOFF

• Tick the box (red arrow) and click on ‘Save the signoff’ (red circle).
CREATE PROJECT FORM REVISION

• Select the Project Form (red circle) you wish to modify and then select ‘Copy Form’ (red arrow).
  – Click on ‘Edit/View’ (yellow arrow) to identify the form is unknown.
PROJECT REVISION PAGE WILL REMAIN THE SAME

- After acknowledging that the form copied successfully by clicking ‘OK’ (yellow arrow), select ‘Continue’ (red circle) as nothing will change.
• Select ‘Revision of prior disclosure’ (red arrow)
  – The Title and Project ID should remain then same.

• Select ‘Continue’ (red circle).
SIGNIFICANT FINANCIAL INTEREST - DESCRIPTION

- Review the SFI definition.
SFI DISCLOSURE

• Make modifications to the listed SFIs as needed. See next two slides for identifying or deleting SFIs.
IDENTIFYING SOURCE OF FINANCIAL INTEREST

• When entering ‘Company Name’, spell out the full name, then select the highlighted name from the drop-down list. (red arrow).

• Do not use acronyms (for example, WSU). Acronyms are used to identify multiple institutions (for example, WSU can be Washington State University, Wayne State University or Wichita State University).

• If the company name you type does not appear on the drop-down menu, select ‘Please click here to enter’ (red circle) and the full name will appear at the yellow arrow.
DELETING A SFI

• Step 1, create a second entry by selecting the ‘Click here to add another entry’ (green arrow).

• Step 2, go back to entry 1 and select ‘Click here to delete this entry’ (red arrow).

• Confirm deletion by selecting ‘OK’ (red circle).
• Confirm you have listed all SFIs (yellow arrow).

• Next, modify the list of relevant SFIs as needed by adding or removing them (red arrows).

• Once done, select ‘Continue’ (red circle).
REVIEW AGREEMENT AND CERTIFICATION

• Once information for all SFIs has been entered, read the confirmation statement (red circle), then hit ‘Continue’ (red arrow) to submit the form.

• On the next page, click on ‘Signoff and Submit’ (yellow arrow) to successfully submit this annual form. Your form is not submitted until you finish this step.
SAVE THE SIGNOFF

• Tick the box (red arrow) and click on ‘Save the signoff’ (red circle).