Veras SFI Disclosure Instructions (8/2023)

Table of Contents

**NOTICE: Some of the screenshots in these instructions may show a teal blue banner at the top that does not appear in your Veras account (like the screenshot in section II.B). Please ignore this difference.

I. Sign into Veras

Log into Veras at https://veras.uidaho.edu .

II. Select Conflict of Interest

    A.   Go to *My Workspaces → Conflict of* interest → *Annual or Project SFI Disclosure Form*.
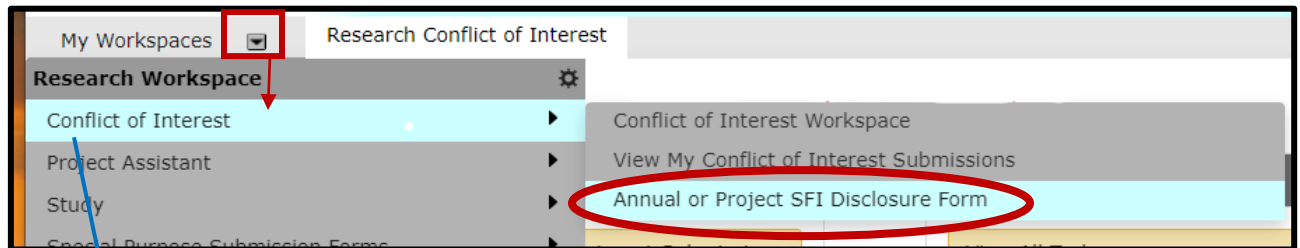
NOTE: The system could not change this text to "Research Conflict of Interest." Notwithstanding the language, this is the place to submit an SFI disclosure for RCOI requirements. This is not where COI disclosures under FSH 6240 are made.

    B.   The "Annual or Project SFI Disclosure Form" list will populate (colors will be a little different). Any previous disclosures you submitted or started will be listed here.

III. Creating the Form

    A.   There are two ways to create a disclosure: *Add a New Form* or *Copy Form*.

Which option do I choose?

Copy Form – *Select this option if you have previously submitted an SFI disclosure using the form updated in 2023. It will copy the information in the selected disclosure . Be sure to review all copied information for accuracy*
***You will not be able to use the copy function if you have not previously submitted a version of this disclosure. The original disclosure form had 1 question and will not copy to the updated format (which has 8 questions and 1 sub-question).

Add a New Form – *Select this option if you have not submitted a disclosure or this 2023 version before, or wish to start with a blank form.*

    B. *Add a New Form*
        a.   Select "Add a New Form."

        b.   The *FSH 5600 – Significant Financial Interests Disclosure form* will populate.

  c. Proceed to section <u>V. Review & Complete the Form</u> to continue these instructions.

C. *Copy Form*
  a. To copy a previously submitted disclosure, check the box to the far left of the disclosure you wish to copy and select "Copy Form."

   i. **FYI** – As the form is populating, a box may appear that tells you a newer version of the form has been published. You must select "Convert to New Form Version" to proceed.
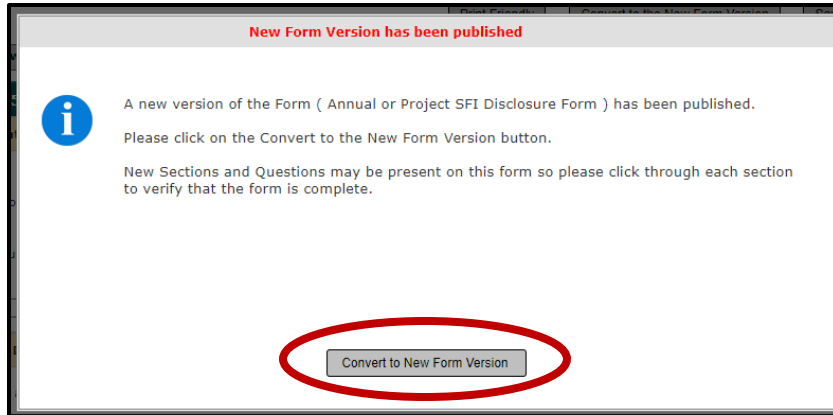
D. A new "FSH 5600 – Significant Financial Interest Disclosure" form will populate. Because the form was copied, it will contain the answers you gave in the copied disclosure. Begin reviewing or completing the form starting with the "Job Title." The name and email information are automatically populated and cannot be changed in the form.
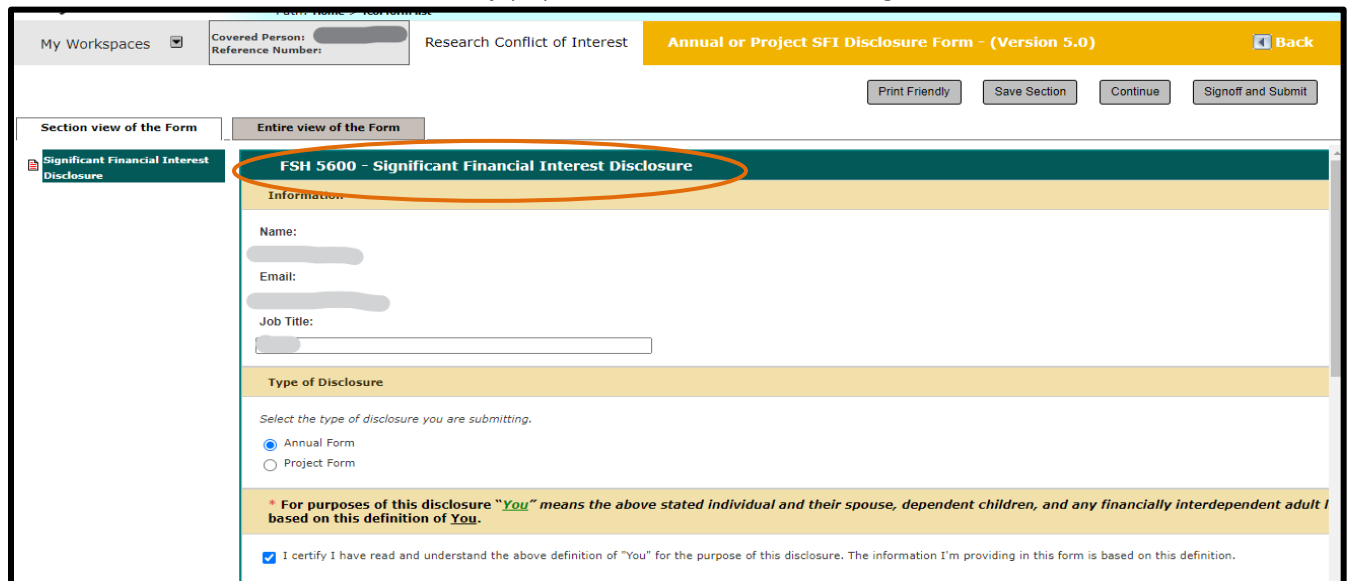
IV. Select 'Annual Form' or 'Project Form'

A. Next is the "Type of Disclosure" field. **Selecting the correct form type is essential to avoid delays if you are submitting a disclosure for a proposal**.
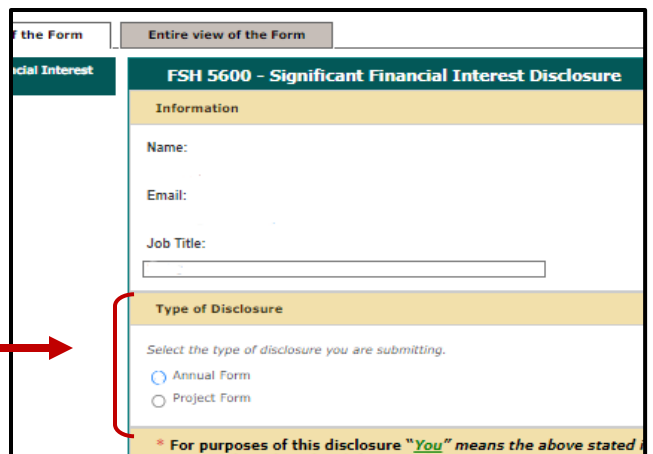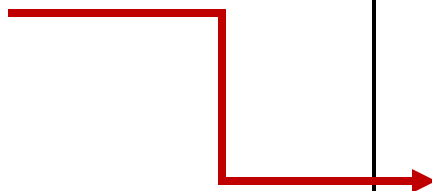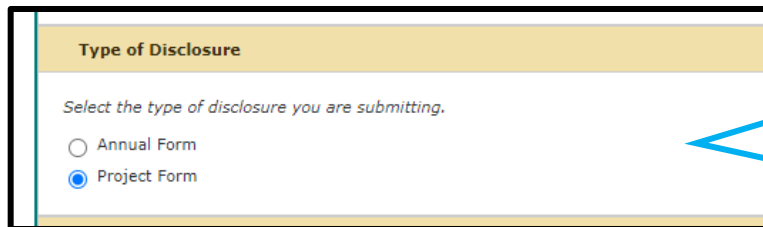
Which form type do I select?

Project Disclosure – Select this option if the disclosure is for a proposal that you are currently preparing to submit. Failure to select 'project form' may delay approval of your proposal.

Annual Disclosure – Select this option for all other disclosures, such as an annual update or update to reflect a newly acquired or discovered SFI.

NOTE: you are required to update your disclosure form within 30 days of acquiring or discovering an SFI that must be reported.
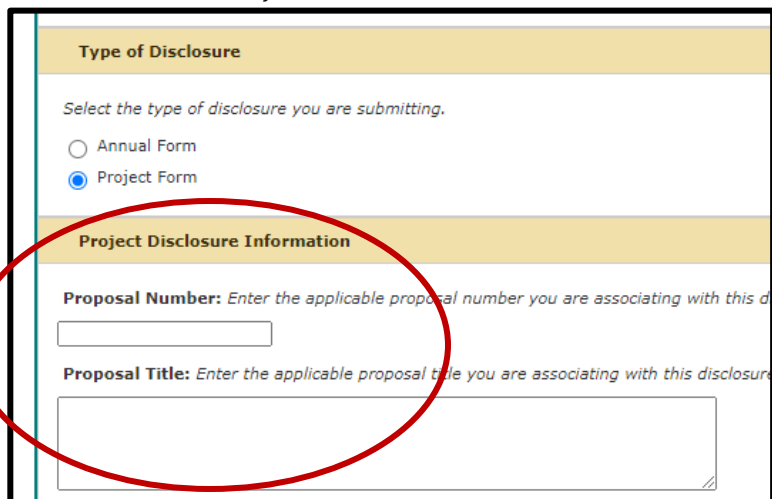
B. Select the appropriate form type and proceed.

Type of Disclosure

Select the type of disclosure you are submitting.

○ Annual Form
● Project Form

IMPORTANT
Select the correct option to avoid delays approving your proposal.

a. **If you selected "Project Form":** A new field titled "Project Disclosure Information" will appear. Provide the requested information.
    i. *NOTE: If you are submitting a Project Form, you are **not** required to also submit an Annual Form with the Project Form.*

Type of Disclosure

Select the type of disclosure you are submitting.

○ Annual Form
● Project Form

Project Disclosure Information

Proposal Number: *Enter the applicable proposal number you are associating with this d*

Proposal Title: *Enter the applicable proposal title you are associating with this disclosure*

Why is additional information required for project disclosures? This information allows the system to automatically alert OSP's Pre-award Unit when a disclosure for a proposal has been submitted.

V. Review & Complete the Form

A. **For Either Forms**: Review each question and check the appropriate answer. If you copied a previous disclosure, review and update the answers given to ensure they are accurate.

b. Select the ⑦ button on the right for additional details about the information requested.
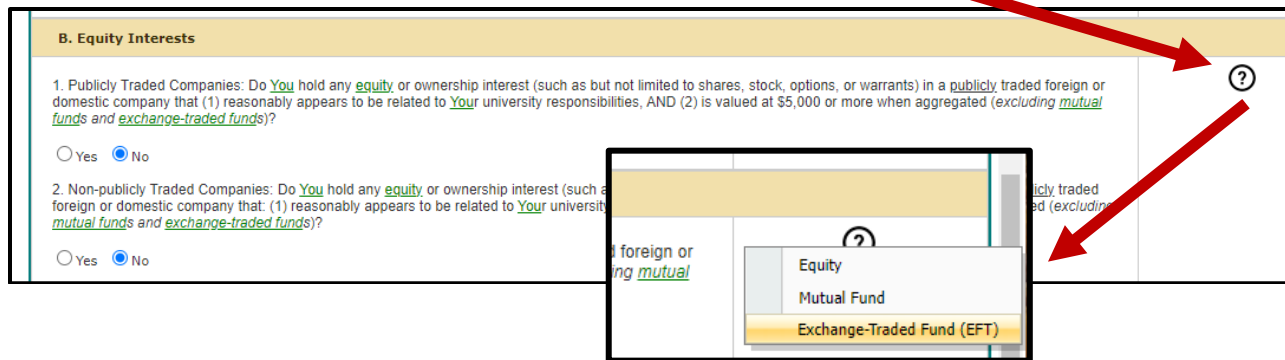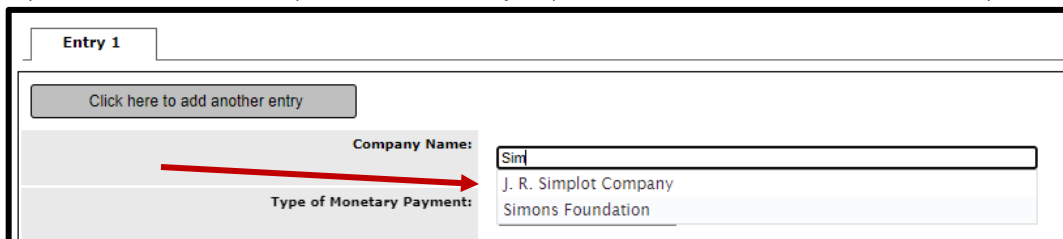
B. You may also hover your curser over text in a **green** font and underlined for a short description or definition.
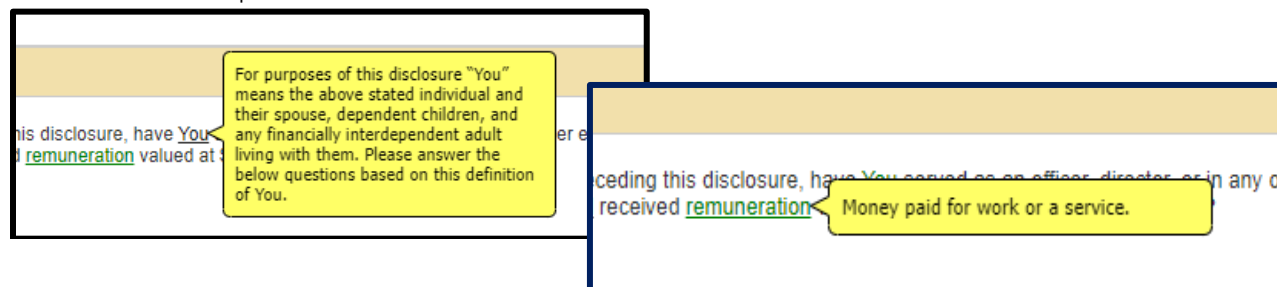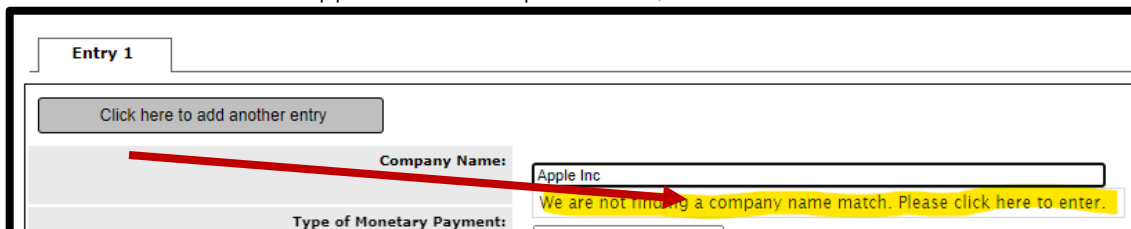

VI. Entering Company or Entity Names

A. Spell out the full name (do not use acronyms), then select the name from the drop-down list.

B. If the name does not appear on the drop-down list, select "…Please click here to enter."

a. The below will populate. The name originally typed into the "Company Name" box will appear in the "If Other, Please Enter the Agency Name" field.

b. Verify the name in the "If Other, Please enter the Agency Name" box is the correct legal name of the company/entity and fill out the rest of the information.

**Entering an agency name without adding or selecting it from the list as explained above will prevent the form from being submitted.

C. Once the company name is entered, fill out the rest of the information in the entry.

VII. Disclosing Multiple SFI's In Response to a Question.

A. If you have more than one SFI to disclose in response to a question, select "Click here to add another entry."

B. An additional entry field will populate as shown below.

C. Complete the information for the additional SFI and repeat as needed.

VIII. Saving a Form; Opening a Saved Form.

A. To save a form in progress, select "Save Section" at the top of the page.

B. Your progress on the form will be saved and you may return later to complete and submit it. The form will be listed on the "Annual or Project SFI Disclosure Form" list by the date it was created and modified.

C. To open a saved form, select the "Edit/View" button for the form you wish to work on.

IX. Deleting an SFI Entry.

A. To remove an SFI, simply select "Click Here to Delete This Entry."

B. The below box will appear. Select "Confirm" or "Cancel."
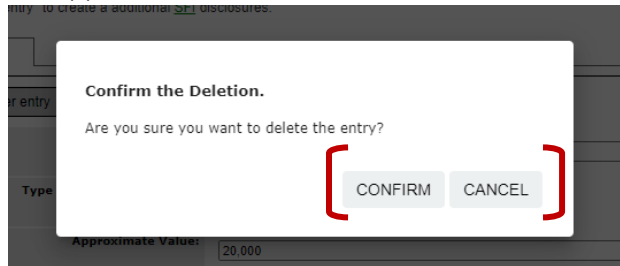
C. The form will appear with the entry removed.

X. Certification & Submitting the Disclosure.

A. The final question on the form is a certification that the information provided is true and correct to your knowledge.

NOTE: *The form will only submit if you can check this box. If you cannot check this box, please contact uifcoi@uidaho.edu .*

A. After checking the certification box, the below will populate.

B. Select "Continue" on the top right of the page.


C. NOTE: If an answer field is not completed, an error message will appear. The form will not submit until all required fields are completed.

 a. An alert like the below will appear near the field(s) that need to be completed.

D. If all required fields are completed, the below screen will populate. Click "Signoff and Submit" to finalize the form.

E. A pop-up will appear stating you are required to sign off on the submission. Select "Ok" or wait for the timer to run down.
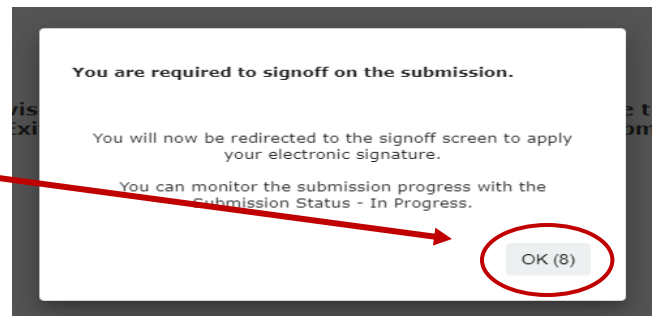
F. The screen will refresh to show the "Submission Routing Signoff" page. Select "submit" to complete the submission. Disclosed SFI's will be reviewed by the RCOI Officer.

G. The disclosure will submit and you will be routed to the "Research Conflict of Interest" home screen. No further action is required on your part.

H. The system will notify you when an updated annual disclosure is required. **However, it is your responsibility to submit an updated disclosure within 30 days of acquiring a new SFI or discovering an SFI that should have been reported.**

XI. Contact Information for Assistance or Questions.

Any questions regarding Research Conflicts of Interest ("RCOI"), the disclosure form, or these instructions may be directed to the RCOI analyst at 208-885-2142 or uifcoi@uidaho.edu .

The University's RCOI policy may be reviewed at FSH 5600.