Help Guide – Submitting Conflict of Interest Disclosures & Requesting a New COI Entity

Logging Into InfoEd

Access InfoEd at infoed.utoledo.edu.
This will take you to the Tower login page. Log in using your UTAD username and password.

Portal View

The Financial Conflict of Interest Widget is one of two mandatory widgets on your portal's home screen. If you have navigated away from the home screen, you can return to it by clicking the "Home" link in the top blue menu.

Financial Conflict of Interest Widget

The widget is the access point for your financial conflict of interest disclosure eForm. The buttons in the widget that allow you to view or update your disclosure eForm change based on where you are in the process of disclosing. Buttons you might see at the bottom of the widget are:

- **Create Initial Disclosure** – If you have never done a disclosure, you will see only one button at the bottom of the widget. Click the button to get started.
- **View Previously Submitted Disclosure** – If you have previously completed a disclosure, this will open the most recently completed disclosure in view mode.
- **Update/Recertify Disclosure** – This is visible if you have previously completed a disclosure and do not have a new disclosure in progress. Click this button to update your disclosure when you have changes to your financial interest or when you are recertifying because it is coming up on one year since your last certification.
- **Finish Disclosure in Progress** – If you had to save and exit before completing and submitting your disclosure, click this button to re-open the disclosure and continue working.

Financial Conflict of Interest Disclosure eForm

When you click the "Create Initial Disclosure," "Update/Recertify Disclosure," or "Finish Disclosure in Progress" buttons, the disclosure eForm will open in a new window. The eForm is comprised of the following pages:

- **General Information and Guidance** – some general guidance on disclosing
- **What Needs to be Disclosed?** – rules and examples of financial interest that should be included in your disclosure.
- **What Does Not Need to be Disclosed?** – rules and examples of financial interests that should NOT be included in your disclosure.
- **Related Financial Interests Statement** – contains the first question of the disclosure.
- **Financial Interests** – if you answer "yes" to the question on the Related Financial Interests Statement, this page becomes visible. On this page, you will list the entities and activities that meet the criteria for disclosure.
- **Attestation And Certification** – this is the final page of the application; to complete your disclosure you must agree to the attestation by selecting the check box.

Navigating the eForm

- **Next** – Use to advance to the next page of the eForm.
- **Previous** – Use to return to the previous page of the eForm.
- **Submit** – When you have completed the eForm, click "Submit" to send the eForm.
- **Save** – If you need to pause before completing the eForm, you can save your progress and close the eForm.
- **Left Menu** – Use the left menu to navigate to a specific page in the eForm.

Adding a Financial Interest

Use the steps below to add a new financial Interest:

1. In the Entity text box, start typing the name of the organization or company in which you have the interest. The list will filter as you continue to type.
2. When you see the entity you need, select it from the list.
   NOTE: If you cannot find the entity you need, see the next section on requesting an entity.
3. Click the "Select Entity" link. This will add a new section to the page for you to detail your activities with the selected entity.
4. Inside the entity box under the Activity/Interest heading, click the "Add New" link.
5. Complete the required fields to describe the activity or interest.
6. If you have additional activities or interests with this entity, you can use the "Add New" link again to define another activity or interest.
7. If you have additional relationships with other entities, scroll back to the top of the page and search for the next entity and repeat the steps to add activities and interests for the new entity.

Requesting a new entity for disclosure

Entities with current disclosures or that have met the requirements for disclosure have been brought over to InfoEd from the current COI website. If you cannot locate an entity, it may not have been brought over. You will need to save your disclosure and navigate back to the InfoEd portal page to submit a new entity request.

1. Locate the COI Entity Request Widget on the Home screen of your portal.
2. Click "Request a New COI Entity" to open the Request eForm.
3. Review the instructions on the first page and then click "Next" to navigate to the Entity Request page.
4. Complete the required fields on the eForm.
5. Click "Submit" in the upper right corner.
6. You will receive an email indicating that your request has been received.
7. Your request will be reviewed, and you will be contacted if additional information is required.
8. You will receive another email when your request is approved or declined with commentary (if applicable).