

Veras SFI Disclosure Instructions (8/2023)

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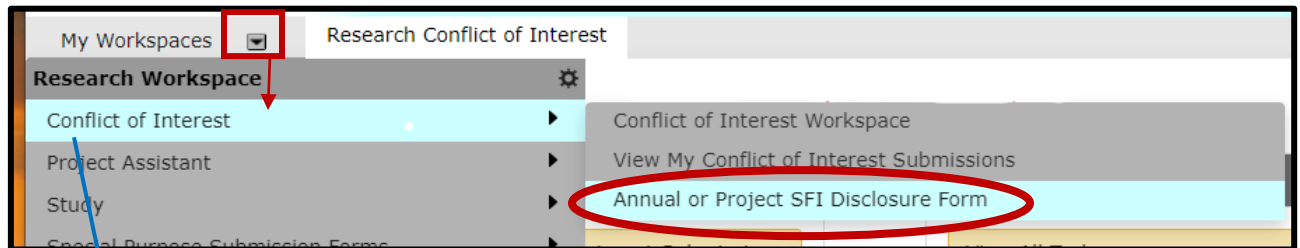
****NOTICE:** Some of the screenshots in these instructions may show a teal blue banner at the top that does not appear in your Veras account (like the screenshot in section II.B). Please ignore this difference.

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.

University of Idaho Account: [redacted] Department: UI - University Research Path: Home Help My Profile Log out

My Workspaces Research Conflict of Interest **Annual or Project SFI Disclosure Form** Back

Copy Form Add a New Form Compare Two Versions Delete Selected Form(s)

List of records associated with form: Annual or Project SFI Disclosure Form. To view previous versions click on the folder icon.

4 result(s) found...

<input type="checkbox"/>	Show Rev	Edit/View	Details	Sub. Rounds	Track Location	Process Submission	Submission Date	Created By	Date Created	Modified By	Date Modified
<input type="checkbox"/>									07/24/2023 11:27:46 AM		07/24/2023 11:27:46 AM
<input type="checkbox"/>					In Process	Retract	07/24/2023 11:27:22 AM PDT		07/24/2023 11:26:59 AM		07/24/2023 11:26:59 AM
<input type="checkbox"/>					In Process	Retract	04/26/2023 10:51:16 AM PDT		04/26/2023 10:51:00 AM		04/26/2023 10:51:00 AM
<input type="checkbox"/>					In Process	Retract	04/26/2023 10:47:30 AM PDT		04/26/2023 10:47:14 AM		04/26/2023 10:47:14 AM

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.”

My Workspaces Research Conflict of Interest **Annual or Project SFI Disclosure Form**

Copy Form **Add a New Form** Com

List of records associated with form: Annual or Project SFI Disclosure Form. To view previous versions click on the folder icon.

4 result(s) found...

<input type="checkbox"/>	Show	Edit/View	Details	Sub.	Track	Process	Submission	Created By	Date Created
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b. The *FSH 5600 – Significant Financial Interests Disclosure* form will populate.

VERAS FCOI Disclosure Instructions

My Workspaces Covered Person: [redacted] Reference Number: [redacted] Research Conflict of Interest Annual or Project SFI Disclosure Form

Section view of the Form Entire view of the Form

Significant Financial Interest Disclosure

FSH 5600 - Significant Financial Interest Disclosure

Information

Name: [redacted]
Email: [redacted]
Job Title: [redacted]

Type of Disclosure

Select the type of disclosure you are submitting.

Annual Form
 Project Form

- c. Proceed to section [V. Review & Complete the Form](#) 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."

My Workspaces Research Conflict of Interest Annual or Project SFI Disclosure Form

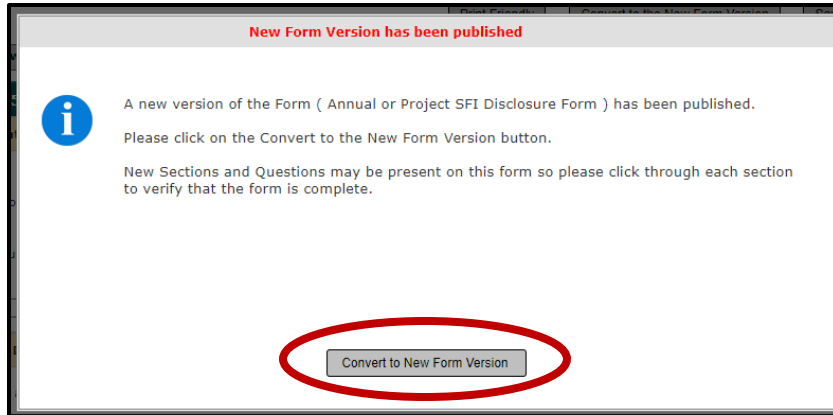
Copy Form

i List of records associated with form: Annual or Project SFI Disclosure Form.
To view previous versions click on the folder icon

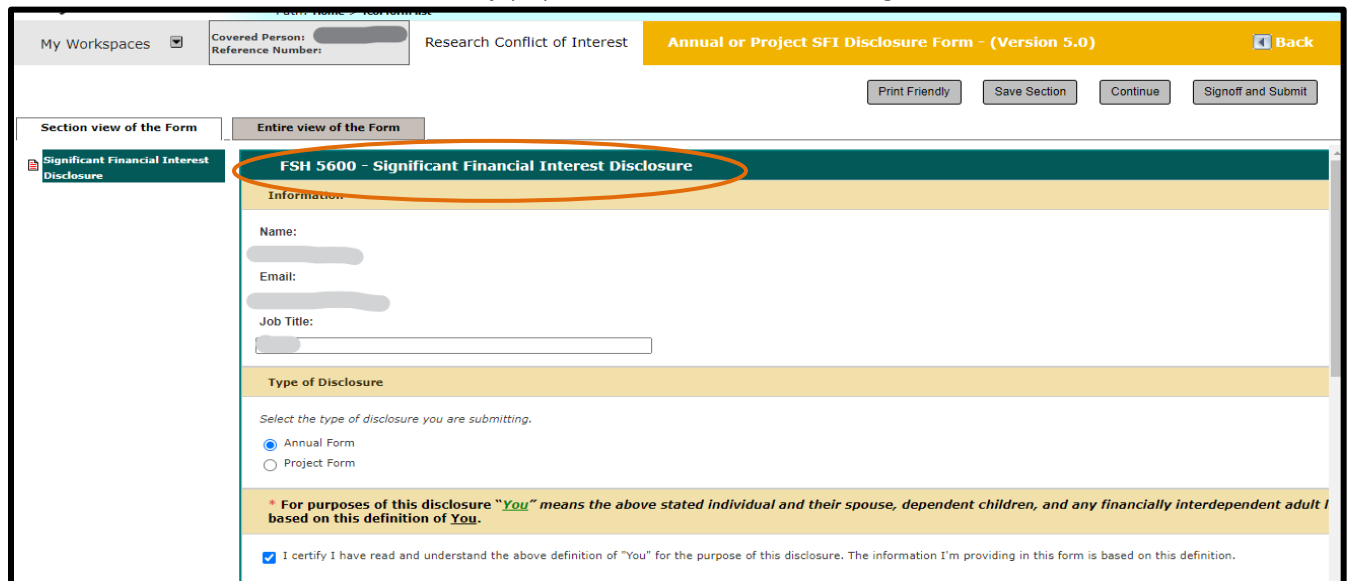
4 result(s) found...

<input type="checkbox"/>	Show Rev	Edit/View	Details	Sub. Round	Track Location	Process Submission	Submission Date	Created By	Date Cre
<input type="checkbox"/>								[redacted]	07/24/2023 11
<input checked="" type="checkbox"/>					In Process	Retract	07/24/2023 11:27:22 AM PDT	[redacted]	07/24/2023 11
<input type="checkbox"/>					In Process	Retract	04/26/2023 10:51:16 AM PDT	[redacted]	04/26/2023 10

- 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.

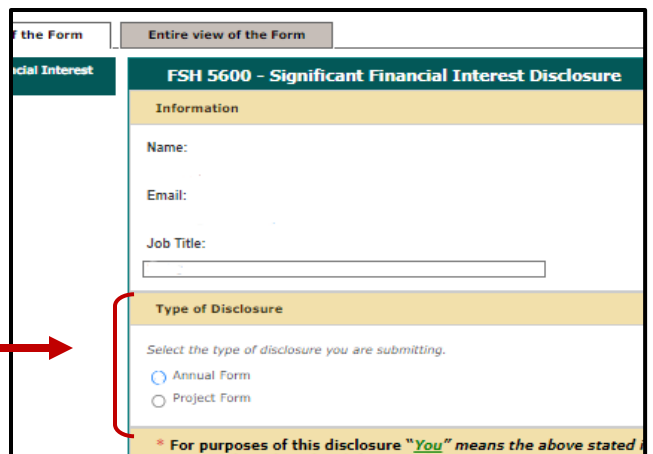
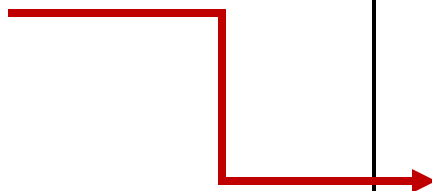


- D. A new "FSH 5600 – Significant Financial Interest Disclosure" form will populate. Because the form was copied, it will contain the answers you gave in the copied disclosure. Begin reviewing or completing the form starting with the "Job Title." The name and email information are automatically populated 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.**



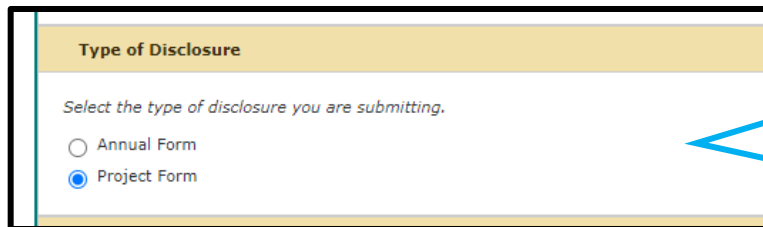
Which form type do I select?

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.

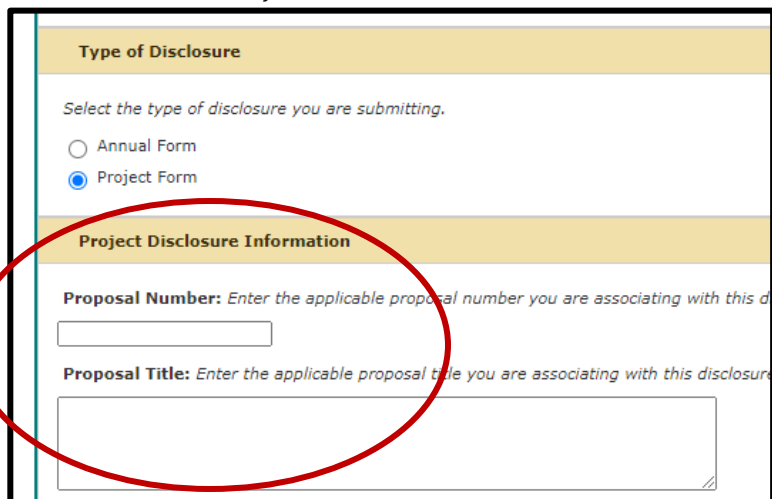
B. Select the appropriate form type and proceed.



The screenshot shows a form titled "Type of Disclosure" with a yellow header. Below the header, it says "Select the type of disclosure you are submitting." There are two radio button options: "Annual Form" (unselected) and "Project Form" (selected with a blue dot).

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.*

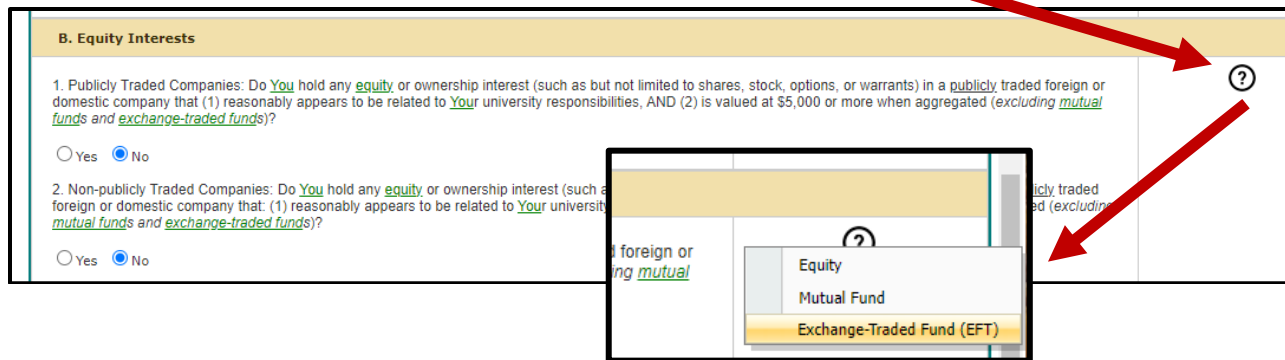


The screenshot shows the "Project Disclosure Information" section of the form. It has a yellow header. Below the header, it says "Select the type of disclosure you are submitting." with "Project Form" selected. Below that, there are two input fields: "Proposal Number: Enter the applicable proposal number you are associating with this d" and "Proposal Title: Enter the applicable proposal title you are associating with this disclosure". A red circle highlights these two input fields.

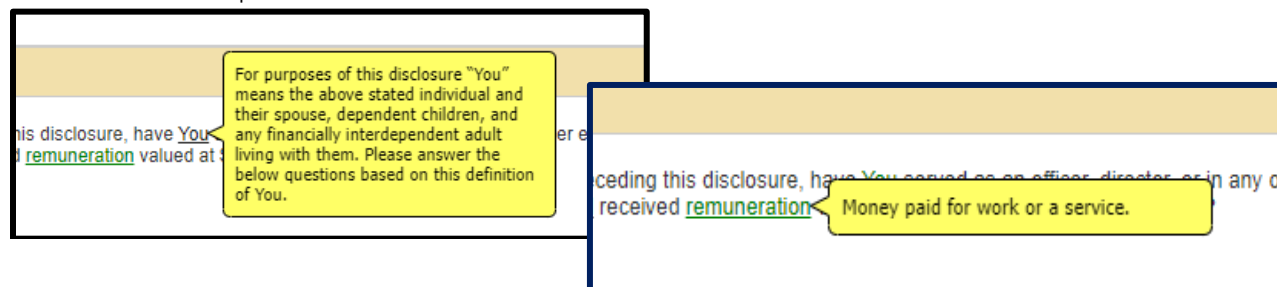
Why is additional information required for project disclosures? This information allows the system to automatically alert OSP's Pre-award Unit when a disclosure for a proposal has been submitted.

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  button on the right for additional details about the information requested.

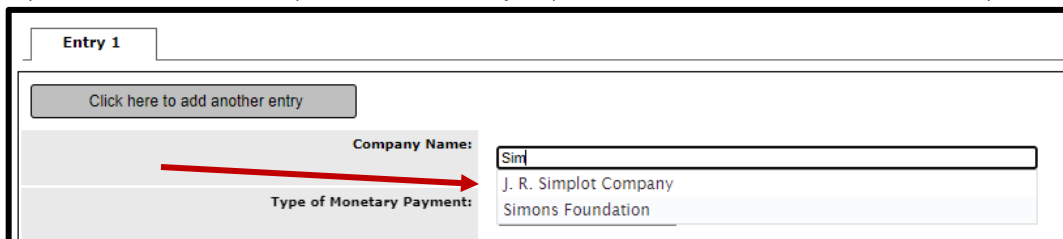


B. You may also hover your cursor over text in a **green** font and underlined for a short description or definition.

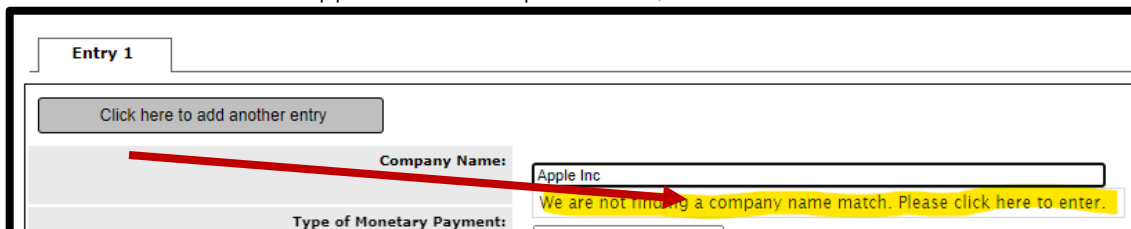


VI. Entering Company or Entity Names

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.

The screenshot shows the 'Entry 1' form with the following fields:

- Company Name:** Other
- If Other, Please enter the Agency name:** Apple Inc
- Type of Monetary Payment:** --none--
- Approximate Value:** (empty)
- Comments:** (empty)

- 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.

The screenshot shows the 'Entry 1' form with the following fields:

- Company Name:** Other
- If Other, Please enter the Agency name:** Apple Inc
- Type of Monetary Payment:** Salary
- Approximate Value:** 80,000
- Comments:** Spouse is a computer engineer.

***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.

The screenshot shows the 'Entry 1' form with the following fields:

- Company Name:** J. R. Simplot Company
- Type of Monetary Payment:** Salary
- Approximate Value:** \$60,000
- Comments:** Spouse works at Simplot in office of legal counsel.

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.”

This screenshot shows the 'Entry 1' form. A red circle highlights the button labeled 'Click here to add another entry'. Below the button, the form fields are partially filled: 'Company Name' is 'Other', 'Type of Monetary Payment' is 'Salary', and 'Approximate Value' is '80,000'. There is also a field for 'If Other, Please enter the Agency name:' with 'Apple I' visible.

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

This screenshot shows the form with two tabs: 'Entry 1' and 'Entry 2'. A red circle highlights the 'Entry 2' tab. Below the tabs, there are buttons for 'Click here to add another entry' and 'Click Here to Delete this entry'. The form fields for 'Entry 2' are empty: 'Company Name', 'Type of Monetary Payment' (set to '--none--'), 'Approximate Value', and 'Comments'.

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

This screenshot shows the form with 'Entry 2' selected. A red bracket highlights the filled-in fields: 'Company Name' is 'Washington State University', 'Type of Monetary Payment' is 'Consulting', 'Approximate Value' is '20,000', and 'Comments' is 'Dependent child works part time at the WSU library.'.

VIII. Saving a Form; Opening a Saved Form.

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

This screenshot shows the top navigation bar of the form. It includes a 'Covered Person: Reference Number: 017499' field, 'Research Conflict of Interest', and the title 'Annual or Project SFI Disclosure Form - (Version 5.0)'. A red circle highlights the 'Save Section' button, which is located between 'Print Friend' and 'Continue' buttons. Other buttons include 'Signoff and Submit' and a 'Back' link.

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- 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.

The screenshot shows the University of Idaho VERAS FCOI Disclosure Form interface. The user is logged in as 'UI - University Research'. The page title is 'Annual or Project SFI Disclosure Form'. Below the title, there are buttons for 'Copy Form', 'Add a New Form', 'Compare Two Versions', and 'Delete Selected Form(s)'. A message states: 'List of records associated with form: Annual or Project SFI Disclosure Form. To view previous versions click on the folder icon'. Below this, it says '5 result(s) found...'. A table lists the records with columns: Show Rev, Edit/View, Details, Sub. Rounds, Track Location, Process Submission, Submission Date, Created By, Date Created, Modified By, and Date Modified. The first row is circled in red.

Show Rev	Edit/View	Details	Sub. Rounds	Track Location	Process Submission	Submission Date	Created By	Date Created	Modified By	Date Modified
<input type="checkbox"/>								07/25/2023 11:03:08 AM		07/25/2023 01:34:47 PM
<input type="checkbox"/>								07/24/2023 11:27:46 AM		07/24/2023 11:27:46 AM
<input type="checkbox"/>				In Process	Retract	07/24/2023 11:27:22 AM PDT		07/24/2023 11:26:59 AM		07/24/2023 11:27:21 AM
<input type="checkbox"/>				In Process	Retract	04/26/2023 10:51:16 AM PDT		04/26/2023 10:51:00 AM		04/26/2023 10:51:17 AM
<input type="checkbox"/>				In Process	Retract	04/26/2023 10:47:30 AM PDT		04/26/2023 10:47:14 AM		04/26/2023 10:47:58 AM

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

The screenshot shows the same University of Idaho VERAS FCOI Disclosure Form interface as above. The 'Edit/View' button for the first record in the table is circled in red.

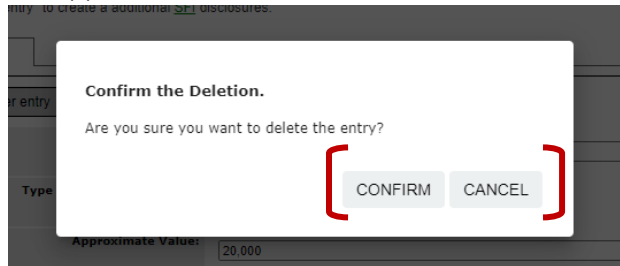
IX. Deleting an SFI Entry.

- A. To remove an SFI, simply select “Click Here to Delete This Entry.”

The screenshot shows the SFI entry form. At the top, there are tabs for 'Entry 1' and 'Entry 2'. Below the tabs, there are two buttons: 'Click here to add another entry' and 'Click Here to Delete this entry'. The 'Click Here to Delete this entry' button is circled in red. Below the buttons, there are fields for 'Company Name' (Washington State University), 'Type of Monetary Payment' (Salary), 'Approximate Value' (20,000), and 'Comments' (Dependent child works part time at the WSU library).

VERAS FCOI Disclosure Instructions

- B. The below box will appear. Select “Confirm” or “Cancel.”



- C. The form will appear with the entry removed.

A screenshot of a form titled "Entry 1". The entry name is redacted with "XXXX" in a red oval. Below the title is a button that says "Click here to add another entry". The form has several sections: "Company Name:" with a dropdown menu set to "Other" and a sub-field "If Other, Please enter the Agency name:" with "Apple Inc" entered; "Type of Monetary Payment:" with a dropdown menu set to "Salary"; "Approximate Value:" with "80,000" entered; and "Comments:" with a text area containing "Spouse salary as computer engineer."

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.

A screenshot of the certification section of the form. It has a yellow header with the text "* Certification". Below it is a radio button that is unchecked, followed by the text: "I hereby certify by submitting this form that the information stated in this form is true and complete to the best of my 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.

A screenshot of the certification section of the form. The radio button is now checked. Below it is the same text as in the previous screenshot. Underneath, there is a red heading: "Please select 'Continue' to finalize the form." followed by a paragraph of instructions: "On the next page you will be asked whether you want to 'Exit,' which leaves the application as a draft, or 'Sign and Submit,' which takes you to the submission page and a pdf of your completed application. **Note that you must click 'Submit' to finalize the application and send it to the COI committee for review.** If you do not complete this step, the submission will show up on your home page as an incomplete task. Select the incomplete task to finalize the submission process."

VERAS FCOI Disclosure Instructions

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

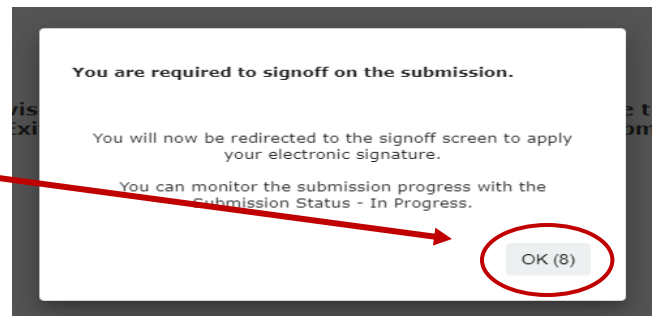
C. **NOTE:** If an answer field is not completed, an error message will appear. The form will not submit until all required fields are completed.

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.

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- 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.

A screenshot of the "Submission Routing Signoff" page in the VERAS system. The page title is "Submission Routing Signoff" and it shows a submission reference number of 017501. There is a table of submission forms with a "Submit" button at the bottom, which is circled in red. The table has columns for "Include in PDF Packet", "Submission Component Name - Version", and "Submission Form(s)". One row is visible with a checkbox and the text "Annual or Project SFI Disclosure Form - (Version 7.0)".

- 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.

A screenshot of the "Research Conflict of Interest" home screen. It shows a search bar with "9 result(s) found..." and a section titled "Conflict of Interest Submission Status - In Progress". Below this, there are two buttons: "In Progress" and "Completed". Under "In Progress", it says "6 result(s) found..." and there is a table with columns "Reference Number" and "Form Name".

- 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](#).