

Veras SFI Disclosure Instructions (4/2024)

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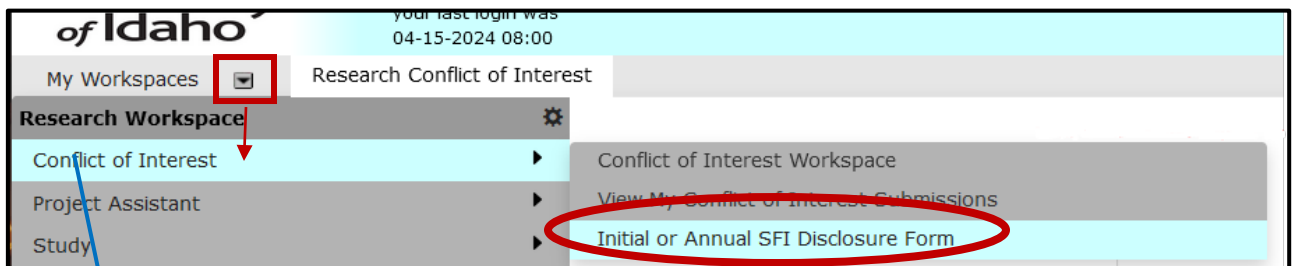
****NOTICE:** Some of the screenshots in these instructions may show a teal blue banner at the top that does not appear in your Veras account (like the screenshot in section II.B). Please ignore this difference.

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

VERAS FCOI Disclosure Instructions

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

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

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

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

12 result(s) found...

	Show Rev	Edit/View	Details	Sub. Rounds	Track Location	Process Submission	Submission Date	Created By	Date Created	Modified By	Date Modified
<input type="checkbox"/>							04/15/2024 09:26:07 AM PDT		04/15/2024 09:25:45 AM		04/15/2024 09:26:06 AM
<input type="checkbox"/>									09/12/2023 12:33:41 PM		09/12/2023 12:33:41 PM
<input type="checkbox"/>									08/02/2023 06:54:11 AM		08/02/2023 06:55:08 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. 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 the 8-question version of this disclosure. The original disclosure form had 1 question and will not copy to the updated format.

Add a New Form – Select this option if you have not submitted a disclosure 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...

	Show	Edit/View	Details	Sub.	Track	Process	Submission	Created By	Date Created
--	------	-----------	---------	------	-------	---------	------------	------------	--------------

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

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 Initial or Annual SFI Disclosure Form

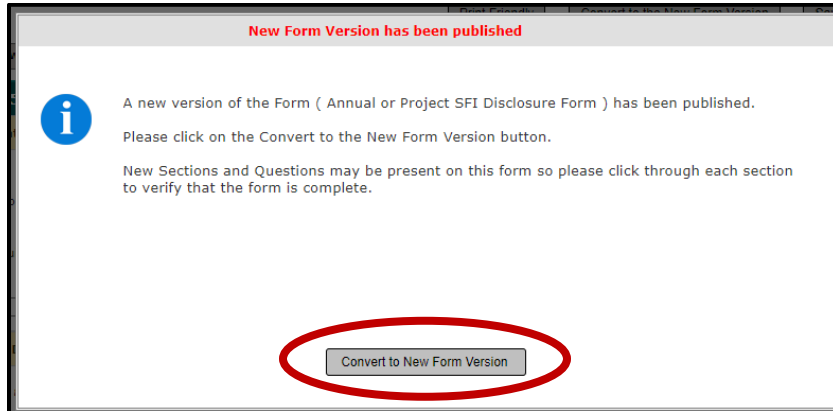
Copy Form

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

16 result(s) found...

<input type="checkbox"/>	Show Rev	Edit/ View	Details	Sub. Rounds	Track Location	Process Submission	Submission Date	Created By	Date Created
<input type="checkbox"/>							04/15/2024 10:15:48 AM PDT	[Redacted]	04/15/2024 10:11:40 AM
<input checked="" type="checkbox"/>							04/15/2024 09:56:07 AM PDT	[Redacted]	04/15/2024 09:35:20 AM

- 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. Review and revise the form starting with the “Job Title.” The name and email information are automatically populated and cannot be changed in the form.

My Workspaces Covered Person: [Redacted] Reference Number: [Redacted] Research Conflict of Interest **Initial or Annual SFI Disclosure Form - (Version 15.0)** [Back](#)

[Print Friendly](#) [Save Section](#) [Continue](#) [Signoff and Submit](#)

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]

*** For purposes of this disclosure “You” means the above stated individual and their spouse, dependent children, and any financially interdependent adult living with them. Please answer the below questions based on this definition of You.**

I certify I have read and understand the above definition of “You” for the purpose of this disclosure. The information I’m providing in this form is based on this definition.

A. Monetary Payments

1. Have **You** received a salary or other payment for services (e.g. consulting fees) in the 12 months preceding this disclosure that: (1) reasonably appears to be related to **Your** university responsibilities, (2) is valued at \$5,000 or more, and (3) are from any foreign or domestic entity other than University of Idaho?


Yes No

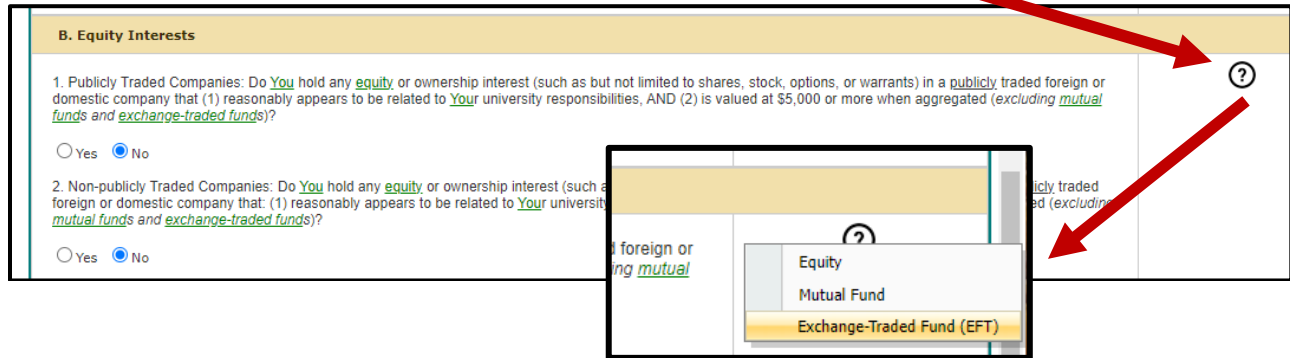
B. Equity Interests

1. Publicly Traded Companies: Do **You** hold any equity or ownership interest (such as but not limited to shares, stock options, or warrants) in a publicly traded foreign or domestic company that (1) reasonably appears to be related to **Your** university responsibilities, AND (2) is valued at \$5,000 or more when aggregated (excluding mutual funds and exchange-traded funds)? ?

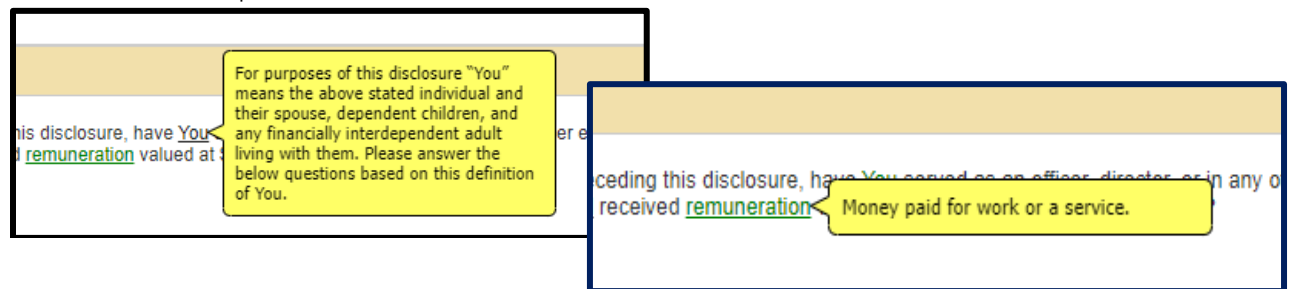
V. Review & Complete the Form

A. 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.

- a. Select the  button on the right for additional details about the information requested.

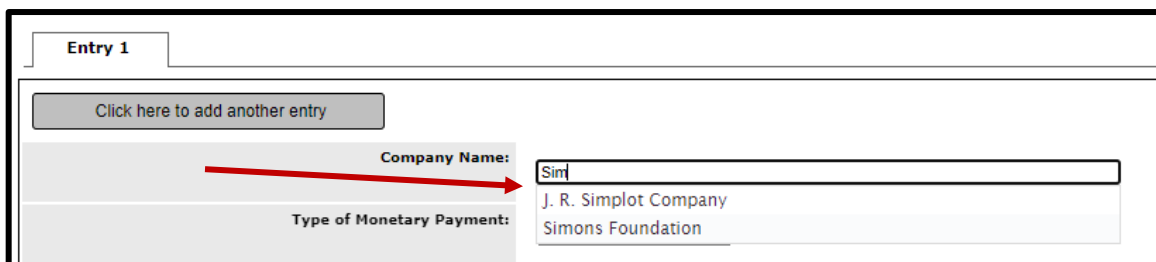


B. You may also hover your cursor over text in a **green** font and underlined for a short description or definition.

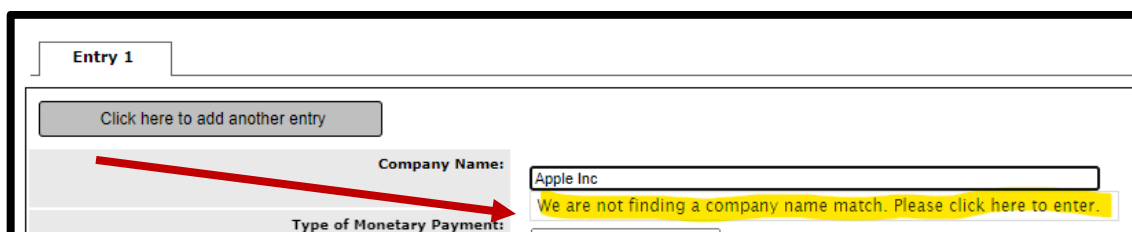


VI. Entering Company or Entity Names

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."



VERAS FCOI Disclosure Instructions

- 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. At the top left is a button labeled 'Click here to add another entry'. Below it, the 'Company Name' field contains 'Other'. To its right, the 'If Other, Please enter the Agency name' field contains 'Apple Inc'. Below these fields are 'Type of Monetary Payment' (set to '--none--'), 'Approximate Value' (empty), and '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. The 'Company Name' field is 'Other' and the 'If Other, Please enter the Agency name' field is 'Apple Inc'. The 'Type of Monetary Payment' dropdown is set to 'Salary'. The 'Approximate Value' field contains '80,000'. The 'Comments' field contains 'Spouse is a computer engineer.'.

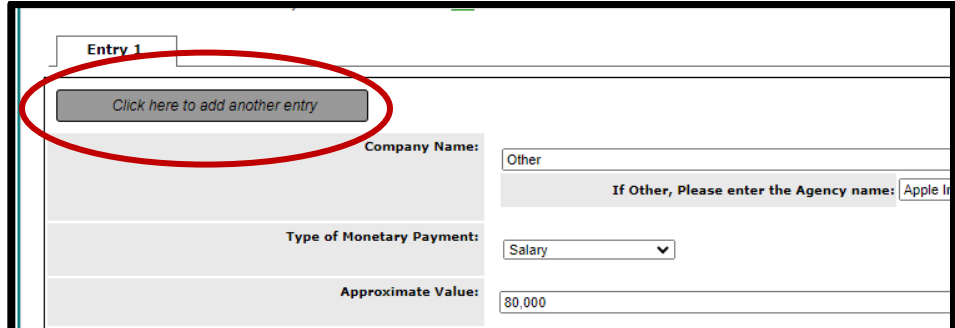
***Entering an agency name without adding or selecting it from the list as explained above will prevent the form from being submitted.*

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

The screenshot shows the 'Entry 1' form. The 'Company Name' field contains 'J. R. Simplot Company'. The 'Type of Monetary Payment' dropdown is set to 'Salary'. The 'Approximate Value' field contains '\$60,000'. The 'Comments' field contains 'Spouse works at Simplot in office of legal counsel.'.

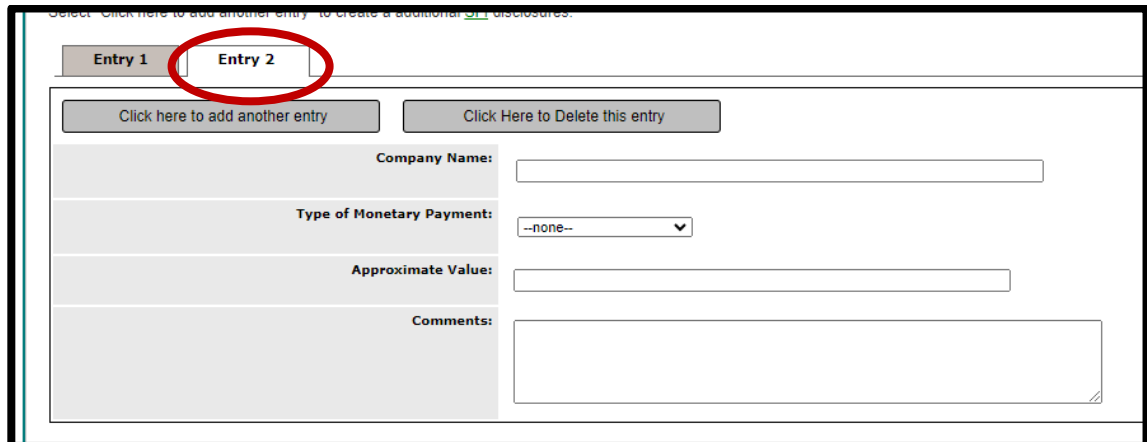
VII. Disclosing Multiple SFI's In Response to a Question.

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



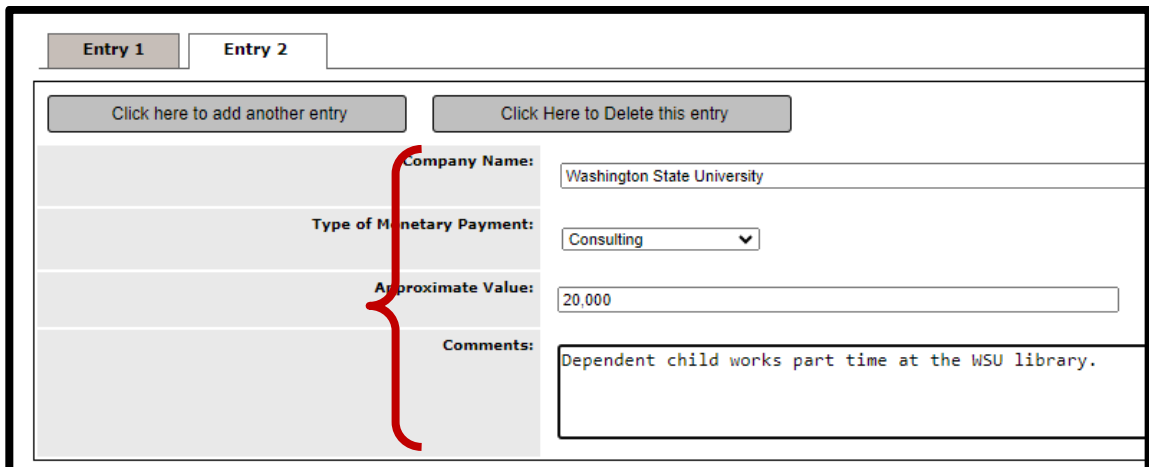
The screenshot shows a form titled "Entry 1". At the top, there is a button labeled "Click here to add another entry" which is circled in red. Below this button are several input fields: "Company Name:" with a dropdown menu showing "Other"; "Type of Monetary Payment:" with a dropdown menu showing "Salary"; and "Approximate Value:" with a text input field containing "80,000". There is also a field for "If Other, Please enter the Agency name:" with a text input field containing "Apple I".

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



The screenshot shows the form with two tabs: "Entry 1" and "Entry 2". The "Entry 2" tab is selected and circled in red. Below the tabs are two buttons: "Click here to add another entry" and "Click Here to Delete this entry". The form fields for "Entry 2" are: "Company Name:" (empty text input); "Type of Monetary Payment:" (dropdown menu showing "--none--"); "Approximate Value:" (empty text input); and "Comments:" (empty text area).

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



The screenshot shows the form with two tabs: "Entry 1" and "Entry 2". The "Entry 2" tab is selected. Below the tabs are two buttons: "Click here to add another entry" and "Click Here to Delete this entry". The form fields for "Entry 2" are: "Company Name:" (text input containing "Washington State University"); "Type of Monetary Payment:" (dropdown menu showing "Consulting"); "Approximate Value:" (text input containing "20,000"); and "Comments:" (text area containing "Dependent child works part time at the WSU library."). A red bracket highlights the "Company Name:", "Type of Monetary Payment:", and "Approximate Value:" fields.

VIII. Saving a Form; Opening a Saved Form.

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

The screenshot shows the top navigation bar with 'My Workspaces' and 'Research Conflict of Interest'. The main title is 'Initial or Annual SFI Disclosure Form - (Version 15.0)'. Below the title, there are buttons for 'Print Friendly', 'Save Section' (circled in red), 'Continue', and 'Signoff and Submit'. The main content area is titled 'FSH 5600 - Significant Financial Interest Disclosure' and includes a form for 'Information' with fields for 'Name' and 'Email'.

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 a list of records associated with the form. The table has the following 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"/>							[Redacted]	04/15/2024 09:35:20 AM	[Redacted]	04/15/2024 09:36:04 AM
<input type="checkbox"/>							[Redacted]	04/15/2024 09:33:47 AM	[Redacted]	04/15/2024 09:33:47 AM
<input type="checkbox"/>							[Redacted]	04/15/2024 09:29:53 AM	[Redacted]	04/15/2024 09:30:45 AM

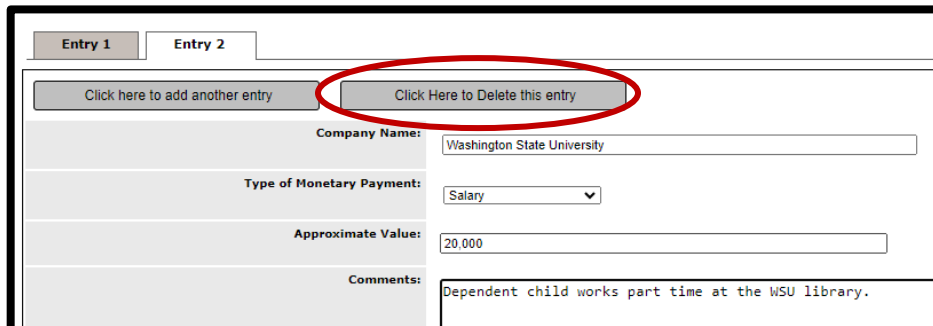
C. To open a saved form, select the “Edit/View” button for the form you wish to work on.

The screenshot shows the same list of records as in the previous screenshot. The 'Edit/View' button for 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"/>							[Redacted]	04/15/2024 09:35:20 AM	[Redacted]	04/15/2024 09:36:04 AM
<input type="checkbox"/>							[Redacted]	04/15/2024 09:33:47 AM	[Redacted]	04/15/2024 09:33:47 AM
<input type="checkbox"/>							[Redacted]	04/15/2024 09:29:53 AM	[Redacted]	04/15/2024 09:30:45 AM

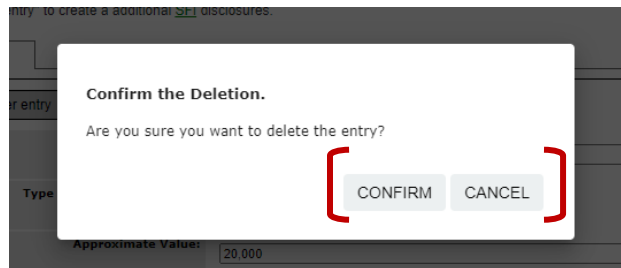
IX. Deleting a SFI Entry.

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



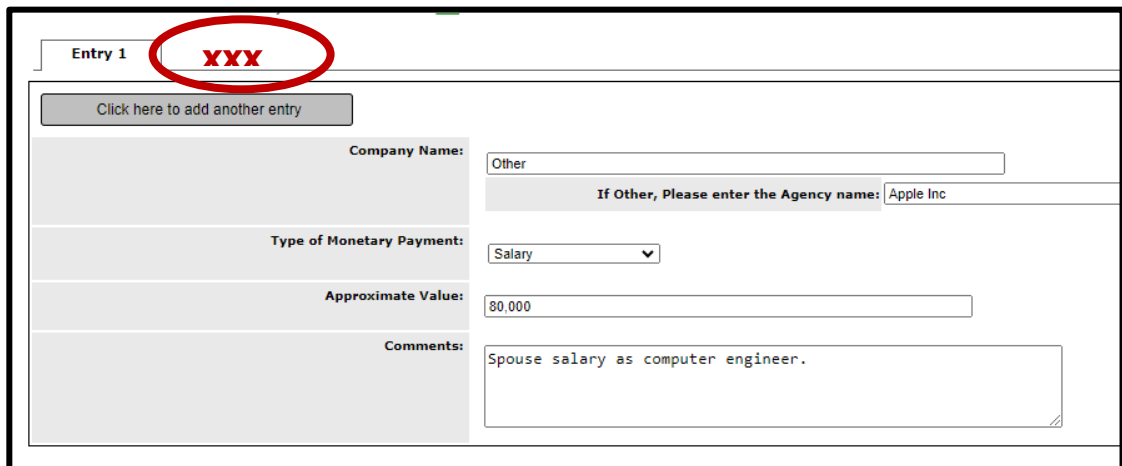
The screenshot shows a form with two tabs: "Entry 1" and "Entry 2". Below the tabs are two buttons: "Click here to add another entry" and "Click Here to Delete this entry". The "Click Here to Delete this entry" button is circled in red. Below the buttons are several input fields: "Company Name" (Washington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

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



The screenshot shows a white dialog box with a dark background. The text inside reads: "Confirm the Deletion. Are you sure you want to delete the entry?". At the bottom of the dialog box are two buttons: "CONFIRM" and "CANCEL". The buttons are highlighted with red brackets.

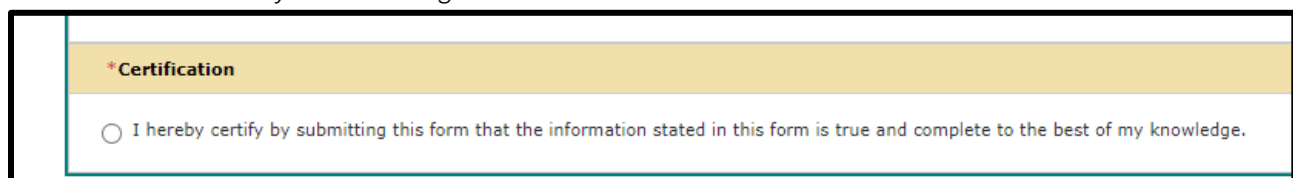
- C. The form will appear with the entry removed.



The screenshot shows the same form as in step A, but with the "Entry 1" tab circled in red and the text "XXX" next to it. The "Click here to add another entry" button is now the only button visible. The input fields are: "Company Name" (Other), "If Other, Please enter the Agency name" (Apple Inc), "Type of Monetary Payment" (Salary), "Approximate Value" (80,000), and "Comments" (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.



The screenshot shows a yellow header with the text "* Certification". Below the header is a radio button 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."

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

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

***Certification**

I hereby certify by submitting this form that the information stated in this form is true and complete to the best of my knowledge.

Please select "Continue" to finalize the form.
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.

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

My Workspaces Covered Person: Reference Number: Research Committee: Initial or Annual SFI Disclosure Form - (15.0) Back

Print Friendly Save Session **Continue**

Section view of the Form Entire view of the Form

Significant Financial Interest Disclosure

D. Services

1. In the 12 months preceding this disclosure, have You served as an officer, director, or in any other executive position in a foreign or domestic entity outside the University of Idaho and received remuneration valued at \$5,000 or more for the services?

- 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.

Secretary Payment: --none--

Error Encountered

An error occurred on the page.

Please correct the mistake and resave the form

OK (2)

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

Approximate Value

The field above is a required field and cannot be left blank.

VERAS FCOI Disclosure Instructions

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

The screenshot shows the top navigation bar with 'My Workspaces', 'Covered Person: Reference Number: 017525', 'Research Conflict of Interest', and the title 'Initial or Annual SFI Disclosure Form - (Version 16.0)'. A 'Back' button is in the top right. Below the navigation bar are 'Print Friendly' and 'Signoff and Submit' buttons. The main content area has two tabs: 'Section view of the Form' and 'Entire view of the Form'. A sidebar on the left shows 'Significant Financial Interest Disclosure'. The main content area features a large green banner that reads 'Form has been Completed!' followed by 'Key Personnel'. Below this is a text block: 'You must submit a revised form within thirty (30) days of becoming aware that any of your answers have changed. To exit without signing click "Exit." To complete the submission click "Sign and Submit" and then you must also click "Save Signoff" on the next page.' At the bottom of this text block are two buttons: 'Exit Form' and 'Signoff and Submit', with the latter circled in red.

- 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.

The pop-up message contains the text: 'You are required to signoff on the submission.' followed by 'You will now be redirected to the signoff screen to apply your electronic signature.' and 'You can monitor the submission progress with the Submission Status - In Progress.' At the bottom right of the pop-up is a button labeled 'OK (8)', which is circled in red. A red arrow points from this button back to the 'Signoff and Submit' button in the previous screenshot.

- 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.

The screenshot shows the 'Submission Routing Signoff' page. The top navigation bar includes 'My Workspaces', 'Research Conflict of Interest', and the title 'Submission Routing Signoff', with a 'Back' button. Below the navigation bar is a 'Submit' button. The main content area shows 'Submission Reference Number: 017525' and a 'Printable Version' button. A table lists the submission forms to be reviewed:

Include in PDF Packet	Submission Component Name - Version
<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Initial or Annual SFI Disclosure Form - (Version 16.0)

At the bottom of the page is a 'Submit' button, which is circled in red.

VERAS FCOI Disclosure Instructions

- G. The disclosure will submit and you will be routed to the “Research Conflict of Interest” home screen showing the status of the form. No further action is required on your part.

The screenshot displays the 'Research Conflict of Interest' home screen. At the top, there are tabs for 'In Progress' and 'Completed', with 'Completed' being the active tab. Below the tabs, it indicates '3 result(s) found...' and '1 - 3'. A table lists the form details:

Reference Number	Form Name	Date Submitted	Actions
017524	Initial or Annual SFI Disclosure Form	04/15/2024 09:56:07 AM PDT	Steps

Below the table, a flow diagram shows the process: 'Pre-Submission' (in a rounded rectangle) with an arrow pointing to 'COI COI Completed' (in a rounded rectangle). Below the diagram is another table with task details:

Task Status	Task Action/Details	Task Name	Date Created	Date Completed	Total Time
📄	Pre-Submission				0 Day(s) 0 Hour(s) 0 Minute(s)

- 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](#).