

# INSTRUCTIONS FOR ANNUAL COI DISCLOSURES

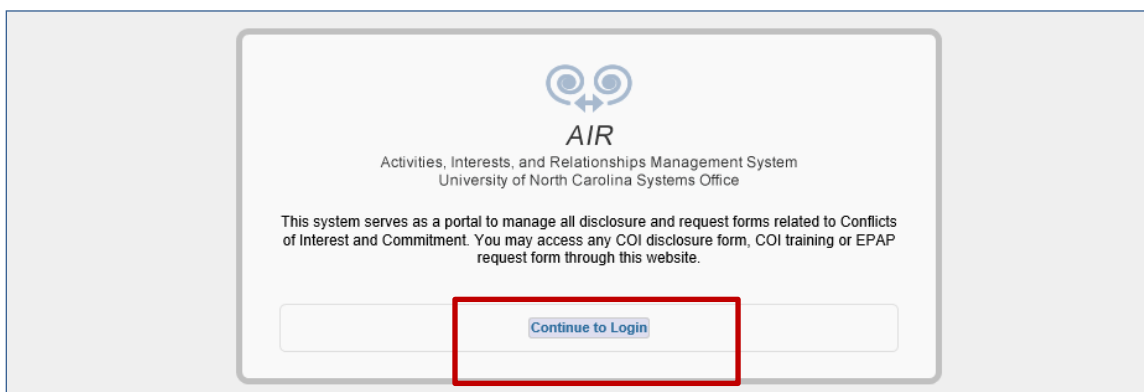
## 1. Purpose of COI Disclosures

All EHRA employees are required to complete the Annual Report of Potential Financial Interests or Relationships. This policy is to ensure that employees' financial interests do not cause Conflict of Interest or Conflict of Commitment to their university responsibilities. COI Disclosures must be submitted every fiscal year. See the COI Policy and Memo under the Help menu in the AIR system for more details.

## 2. Navigate to the AIR homepage using one of the following:

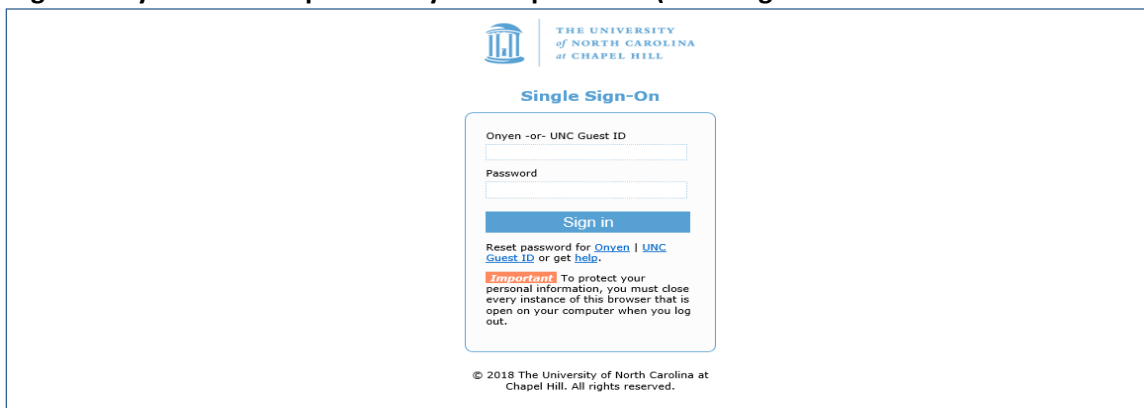
- a. Air System link <https://uncga.myresearchonline.org/air/>
- b. System Office My Apps page <https://myapps.northcarolina.edu> (click on the AIR icon)

## 3. Click "Continue to Login".



## 4. You will land on the AIR Authentication page

Login with your UNC Chapel Hill onyen and password (same login as TIM and ConnectCarolina)



## 5. After logging in, you will land on the AIR Home page

The screenshot shows the AIR Home page. At the top, a navigation bar contains links for HOME, MY DASHBOARD, PROFILE, HELP, and LOGOUT, with a callout 'a' pointing to the HOME link. Below the navigation bar is the 'Disclosure Dashboard' section, which includes links for My COI Disclosures, Awaiting Submitter Response, Submitter Change Needed, My EPAP Requests, and Certification/Approval. A callout 'b' points to the My COI Disclosures link. To the right of the dashboard is a main content area with the title '>> Activities Interests and Relationships @ UNC - System Office'. This area contains introductory text about the system's purpose and a 'For Help' section with contact information. At the bottom of the main content area is a box titled 'Links for Self Initiated Disclosures' with a callout 'c' pointing to the 'Annual or an Updated Annual COI Disclosure Form' link. The footer of the page features the University of North Carolina System logo.

- Use the top menu links to navigate through the system
- Use the Disclosure Dashboard links to view your disclosures
- Use the Self Disclosure links at the bottom of the page to enter new COIs and EPAPs

## 6. Click the “Annual or an Updated Annual COI Disclosure Form” link.

This is a close-up screenshot of the 'Links for Self Initiated Disclosures' section. It shows two links: '>> Annual or an Updated Annual COI Disclosure Form' and '>> Notice of Intent to Engage in External Professional Activities for Pay - EPAP'. A red box highlights the first link, and a callout 'c' points to it.

## 7. The system displays the COI/Annual form.

The screenshot displays a web form titled "General Questions" with a sub-section "Contact Information". This section contains a note and three input fields: "Last Name" (Doe), "First Name" (John), and "Dept Name" (Human Resources). Below these is a "Role" section with a radio button selected for "Disclosing Person".

The second section contains seven numbered questions, each with a "Yes" or "No" radio button option. All questions are marked as required with a red asterisk. Question 2 asks about financial interests in entities affecting employment. Question 3 asks about intellectual property rights. Question 4 asks about external professional activities for pay. Question 5 asks about employing or supervising UNC System Office personnel. Question 6 asks about financial interests in entities providing property, goods, or services to UNC System Office. Question 7 asks about authoring texts or manuals required for university activities.

At the bottom of the form, there is a "Save and Continue" button and a "Required" legend. A note at the bottom states: "To navigate the COI Disclosure Annual, press continue or any link in the Item List to your left."

Annotations: A red box highlights the "Contact Information" section (labeled 'a'), another red box highlights the seven questions (labeled 'b'), and a red box highlights the "Save and Continue" button (labeled 'c').

- The Contact Information section will have your name and department information. You cannot update contact information in AIR. If corrections/updates are needed, contact Robbie Snuggs at [rrs@northcarolina.edu](mailto:rrs@northcarolina.edu) (919)843-5671.
- Read and complete the COI questions (2 – 7).
- A “Yes” response to Questions 2-7 will trigger requests for additional information.
- After completing your disclosure, click “Save and Continue” at the bottom of the page and the system will display the Additional Information page.

8. The Additional Information is optional, but can be utilized to describe your particular situation and provide information that may be helpful conducting the COI evaluation. We encourage you to share any feedback on the questions or process here.

>> Additional Information Reference Id: 85

Current Form: [Quick View \(HTML\)](#) [PDF](#) [View FAQ](#) [Delete Submission](#)

1. Please provide any additional information here that is not already addressed above. You are not required to submit any additional information. **Note: Do not include any information in this section if you have answered "No" to all of the above questions, as your response will not be reviewed.**

**\*** Required.

To navigate the COI Disclosure Annual, press continue or any link in the Item List to your left.

[Save and Continue](#)

- a. Enter your additional comments (optional).
- b. Click "Save and Continue" and the system will display the Certify page.

9. Click the "Submit and Certify" button to complete your disclosure. Do **NOT** use the yellow "Proceed to Submit" button on the left. You can click "Cancel" to cancel the form.

Item List click on section name to expand

- 1. Conflict of Interest
- 1.1 [General Questions](#)

The COI Disclosure Annual can be submitted at this time.

[My Dashboard](#)

[Disclosure Status](#)

[Proceed to Submit](#)

Routing >> Submit And Certify COI Disclosure Annual Reference Id: 20978

Current Form: [Quick View \(HTML\)](#) [PDF](#) [View FAQ](#) [Delete Submission](#)

COI Disclosure Annual: Annual

Disclosing Person: Christian Farior

You are now ready to submit your disclosure. You may do this by pressing the 'Submit and Certify' button below.

I certify that the information provided is complete and accurate to the best of my knowledge.

[Submit And Certify](#) [Cancel](#)

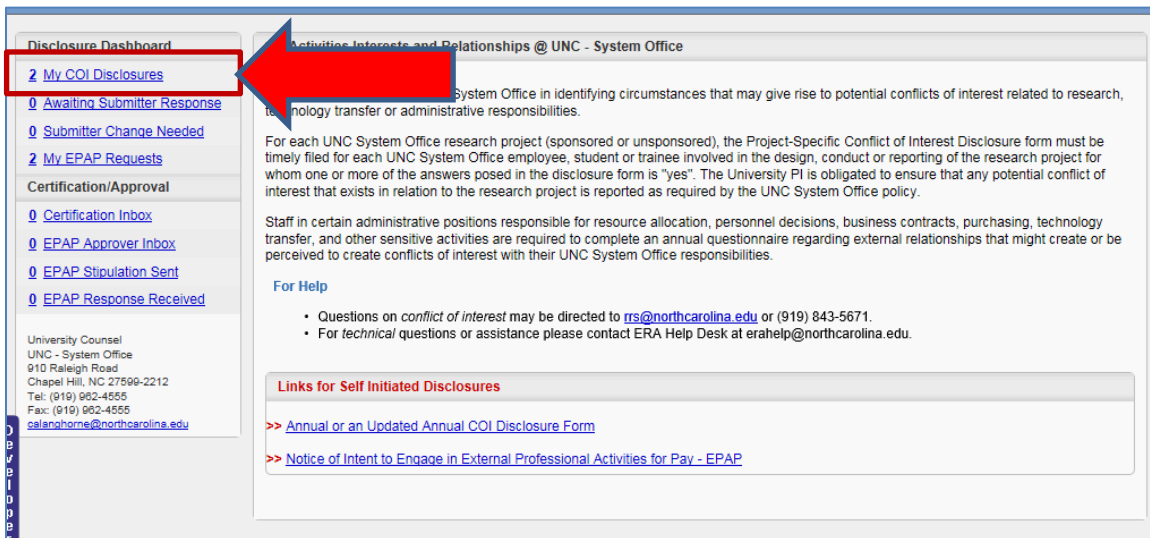
- You will receive an email notification stating that your COI has been submitted.

## 10. After your COI is submitted,

- If you answered “No” to all questions, then your annual disclosure process is complete. You will not need to do anything else.
- If you answered “Yes” to any questions, you will receive a follow-up email indicating whether additional steps (e.g., review by the COI Staff, creation of a management plan) are needed. Please allow two weeks after your submission for the COI Staff to complete the initial review process and get back in touch with you.
- If necessary, the COI Staff will contact you and/or your manager during the review process.
- If necessary, the COI Staff or manager will consult with the Legal Office on the COI review.
- When the COI Office (and all other parties) finish the review, you will receive an email confirmation stating the process is complete.
- If you have a potential conflict that needs to be addressed immediately, please contact Robbie Snuggs at [rrs@northcarolina.edu](mailto:rrs@northcarolina.edu) (919)843-5671.

## 11. Check the status of your disclosure and review prior disclosures at any time by:

- a. Logging into AIR
- b. Navigating to the Home page
- c. Locating the Disclosure Dashboard on the left side of the screen
- d. Clicking on “My COI Disclosures” link



The screenshot displays the 'Disclosure Dashboard' interface. On the left sidebar, under the 'Disclosure Dashboard' heading, the link '2 My COI Disclosures' is highlighted with a red box and a red arrow. Other links in the sidebar include '0 Awaiting Submitter Response', '0 Submitter Change Needed', '2 My EPAP Requests', and a 'Certification/Approval' section with links for '0 Certification Inbox', '0 EPAP Approver Inbox', '0 EPAP Stipulation Sent', and '0 EPAP Response Received'. The main content area is titled 'Activities, Interests, and Relationships @ UNC - System Office' and contains text explaining the disclosure process, a 'For Help' section with contact information for Robbie Snuggs, and a 'Links for Self Initiated Disclosures' section with links to the 'Annual or an Updated Annual COI Disclosure Form' and the 'Notice of Intent to Engage in External Professional Activities for Pay - EPAP'.

**12. In the “Filter By” drop-down box, select All Disclosures. All prior disclosures will appear, organized under three tabs:**

- Incomplete (awaiting completion by you)
- In Process (submitted but under review)
- Complete

>> Conflict of Interest - My Disclosures

Filter By: All Disclosures

Incomplete (4) In Process (1) Complete (2)

**Completed Disclosures**

ID/COI #	COI Type	Title	Related Number	Date Created	Date Submitted	Disclosure Status	Review Status
<a href="#">15-00325</a>	<a href="#">COI Disclosure Annual</a>	Annual	Annual	5/18/2015	5/18/2015	Completed	No Conflict
<a href="#">14-00198</a>	<a href="#">COI Disclosure RAMSeS</a>	TRIAD-2 Center ...	11-0407	4/9/2014	4/9/2014	Completed	No Conflict

Several possible categories that may appear under Review Status:

- Stipulated – You have been asked to provide additional information or clarification.
- Pending – The disclosure is under review.
- No Conflict – The disclosure has been reviewed and there is no conflict.
- FCOI Management – A management plan has been put in place to facilitate the objective conduct of applicable activities.

Click the ID/COI # or pdf icon to review the COI disclosure.

**13. Help Options**

- If you have questions about the form or the COI process, please contact Robbie Snuggs at [rrs@northcarolina.edu](mailto:rrs@northcarolina.edu) or (919)843-5671.
- You can submit a help request in the application using the Help menu at the top.
- If you have technical issues, please contact [erahelp@northcarolina.edu](mailto:erahelp@northcarolina.edu).