



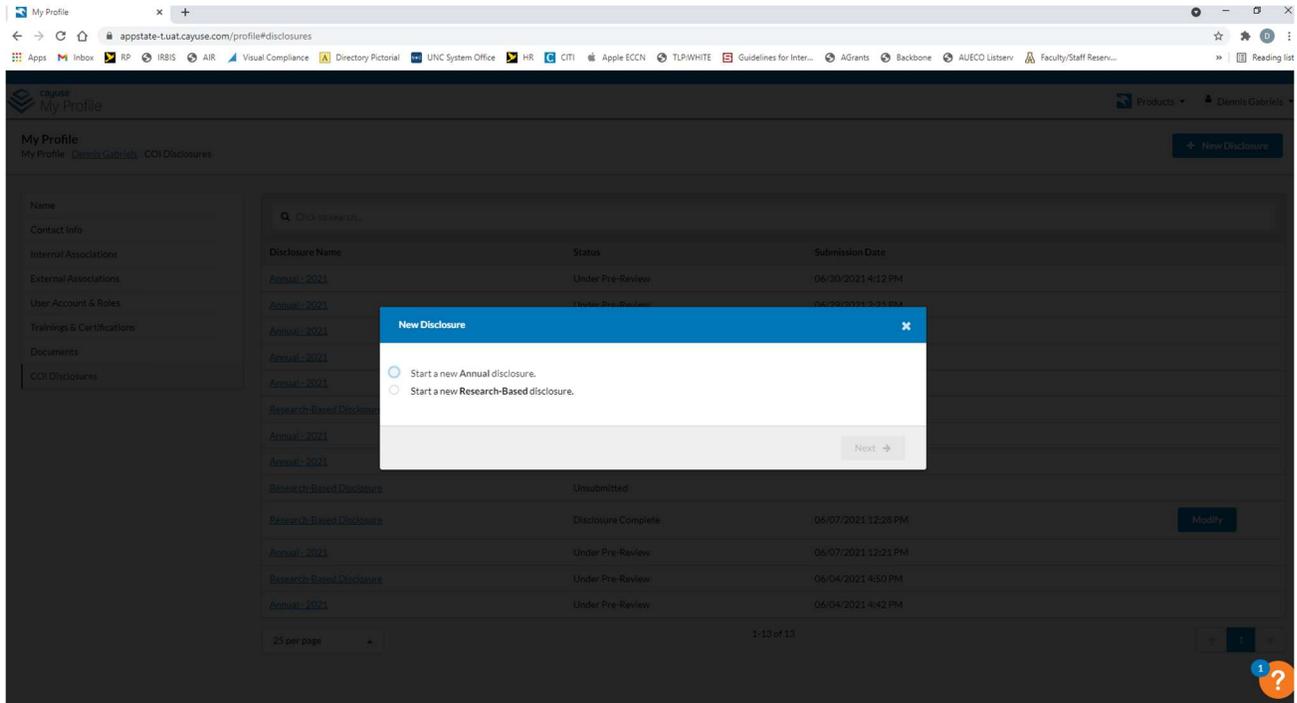
# HOW TO CREATE AN ANNUAL COI DISCLOSURE IN CAYUSE

1. Go to <https://appstate.app.cayuse.com/profile#disclosures>
2. Click on “+ New Disclosure”

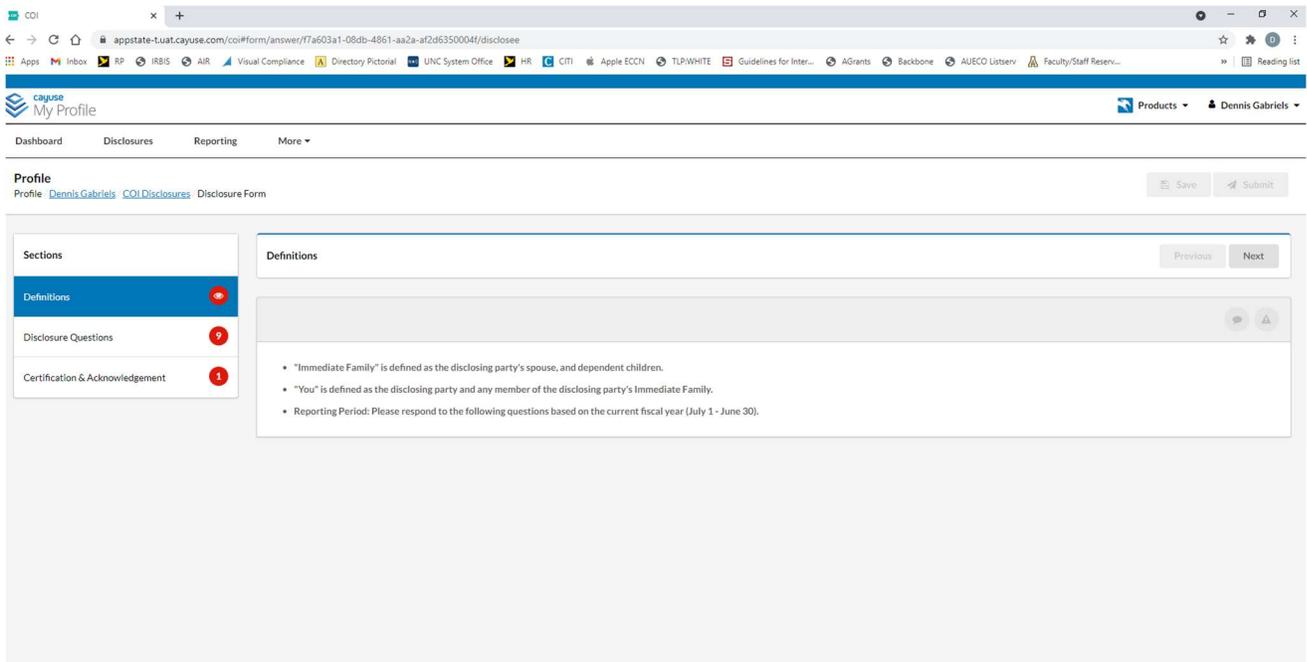
The screenshot shows the 'My Profile' page for 'Dennis Gabriels' in the Cayuse system. The 'COI Disclosures' section is active, displaying a table of disclosures. A red arrow points to the '+ New Disclosure' button in the top right corner of the disclosure list area.

Disclosure Name	Status	Submission Date
<a href="#">Annual - 2021</a>	Under Pre-Review	06/30/2021 4:12 PM
<a href="#">Annual - 2021</a>	Under Pre-Review	06/29/2021 2:21 PM
<a href="#">Annual - 2021</a>	Under Pre-Review	06/24/2021 2:16 PM
<a href="#">Annual - 2021</a>	Under Pre-Review	06/17/2021 2:17 PM
<a href="#">Annual - 2021</a>	Unsubmitted	
<a href="#">Research-Based Disclosure</a>	Unsubmitted	
<a href="#">Annual - 2021</a>	Under Pre-Review	06/15/2021 2:26 PM
<a href="#">Annual - 2021</a>	Under Pre-Review	06/10/2021 2:35 PM
<a href="#">Research-Based Disclosure</a>	Unsubmitted	
<a href="#">Research-Based Disclosure</a>	Disclosure Complete	06/07/2021 12:28 PM
<a href="#">Annual - 2021</a>	Under Pre-Review	06/07/2021 12:21 PM
<a href="#">Research-Based Disclosure</a>	Under Pre-Review	06/04/2021 4:50 PM
<a href="#">Annual - 2021</a>	Under Pre-Review	06/04/2021 4:42 PM

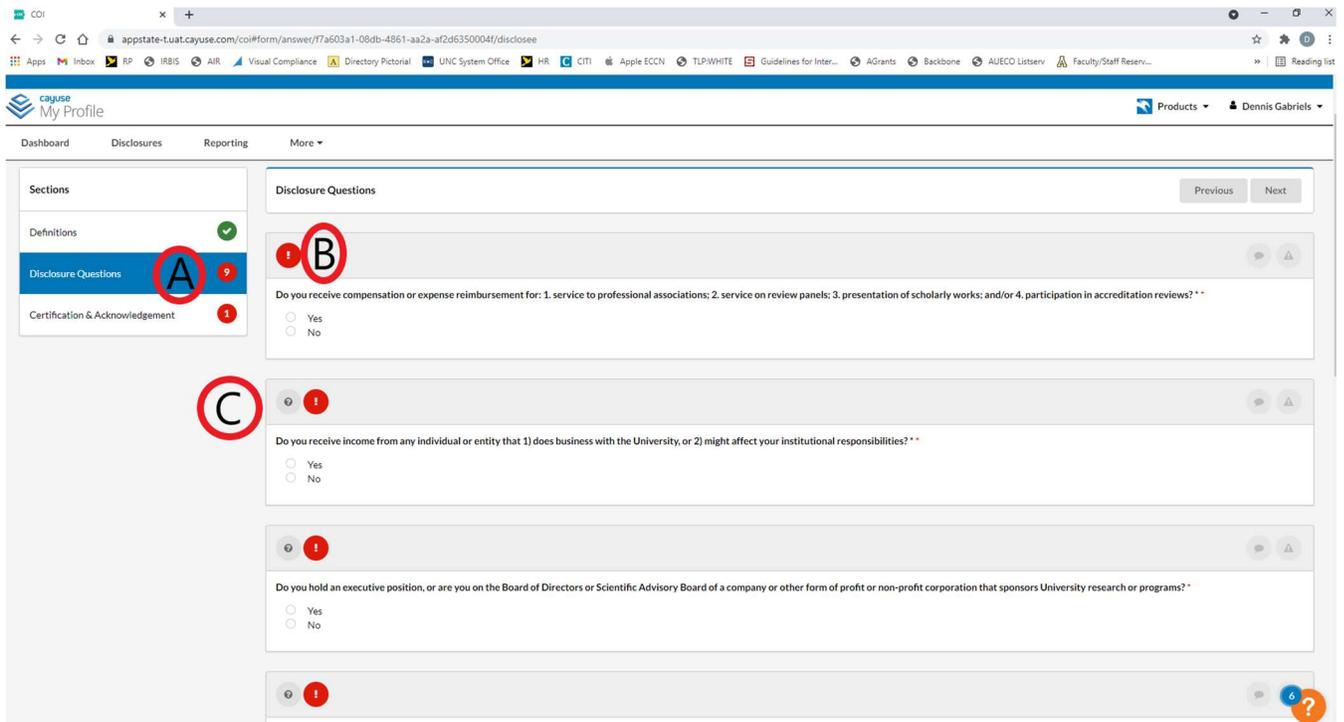
3. Select “Start a new Annual disclosure” and click “Next →”



4. Click on “Definitions” highlighted in the screen below and click “Next”

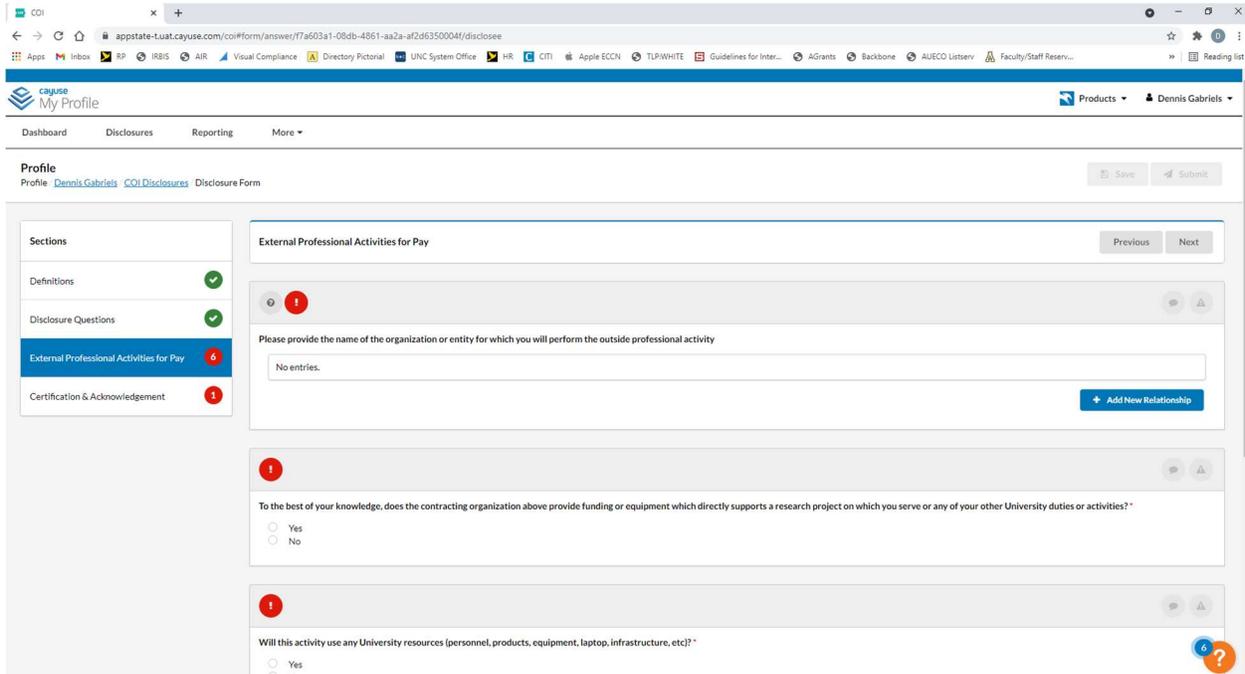


5. Answer the questions in the screen below.

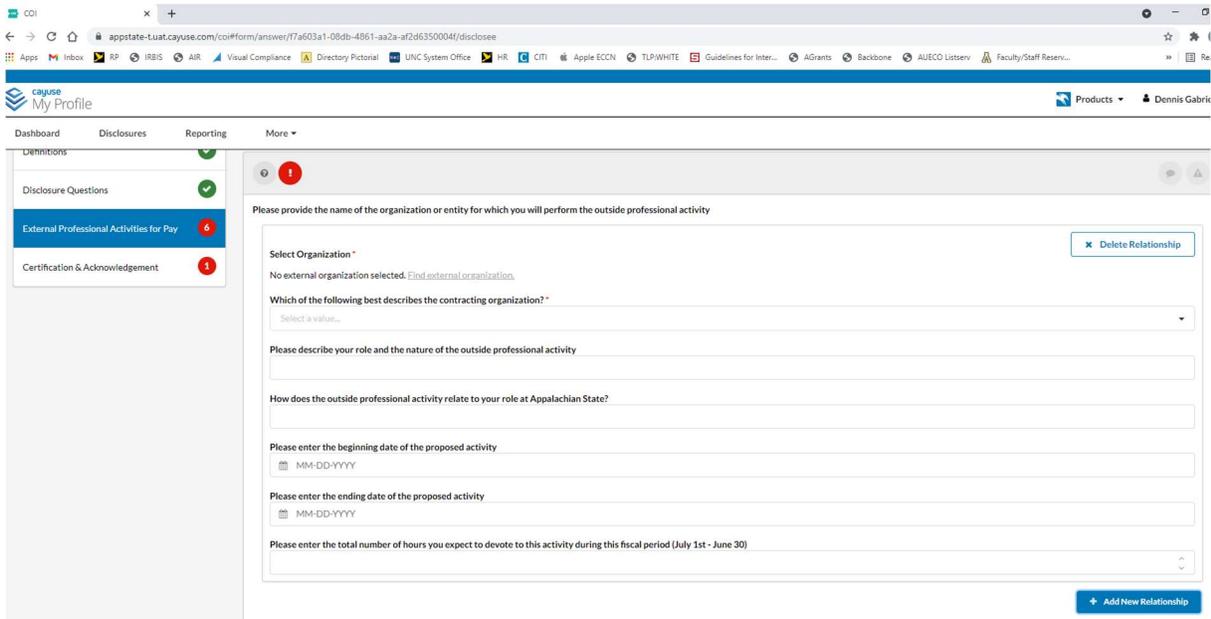


- A:** The number 9 indicates the number of required questions to be completed for this section. Once you have completed all question, you will see a green checkmark.
- B:** An exclamation mark indicates an answer is required for this question.
- C:** The Question mark hides clarifying information. You can display this by hovering your cursor over the “?”

6. If you answered “Yes” to any of the Disclosure Questions, additional sections will be displayed.



7. To enter the entity / organizations associated with this professional activity for pay, click on “+ Add New Relationship”. This will display the screen below:



8. Click on “Find external organization”. This will bring up the pop-up screen below:

The screenshot shows a web interface titled "External Org Finder". At the top, there is a search bar with the text "consulting". Below the search bar is a table with a header "Name" and five rows of organization names: "AAC Consulting Group, Inc.", "ACTT Consulting LLC", "ADS Pharma Consulting, LLC", "ALB Consulting", and "AVAR Consulting, Inc.". Each row has a plus sign (+) on the right side. Below the table are "Prev" and "Next" buttons, and the text "1-5 of 202". Underneath is a section titled "Selected Records" with a table containing one row: "ADS Pharma Consulting, LLC" with a red "x" icon on the right. At the bottom of the interface are three buttons: "Cancel", "+ Request New External Org", and "Save".

- a. Enter information in the search field to find the organization in our database.
- b. Select the organization in the “Name” section
- c. Click Save
- d. If your organization is not listed in our database, you can click on “+ Request New External Org” and provide the information requested so we can add this organization to our database

9. The process above can be repeated if multiple organizations need to be added

10. Once you have completed all questions in the section, you will again see a green checkmark. Click “Next”

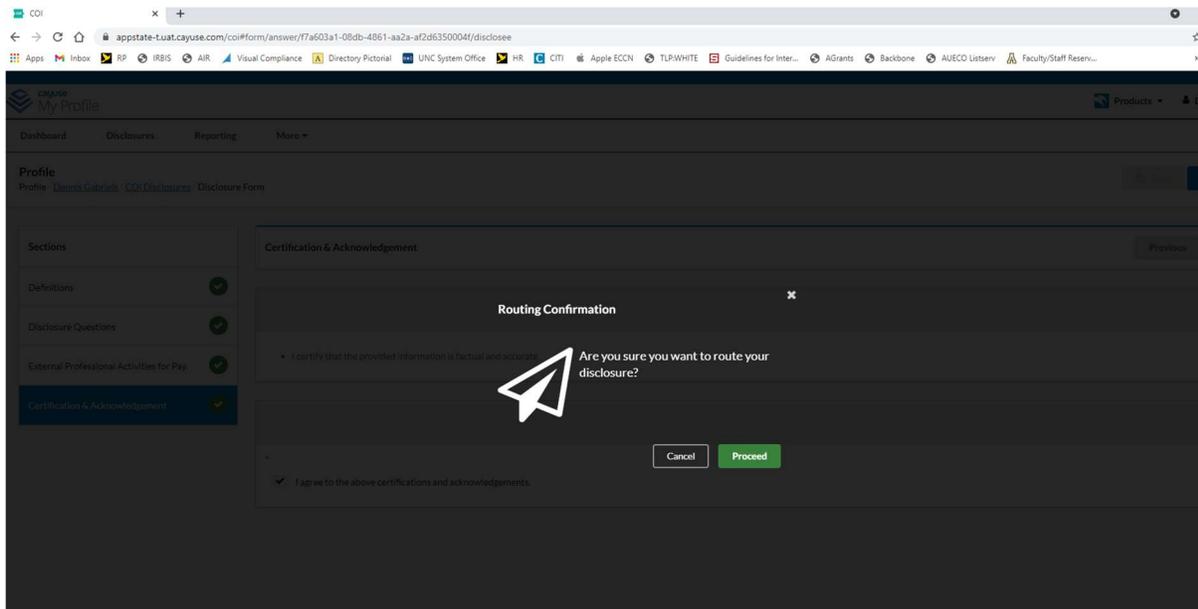
11. Check the checkbox in the screen below to indicate you have completed the form to the best of your abilities:

The screenshot shows a web browser window with the URL `appstate-luat.cayuse.com/coi#form/answer/77a603a1-08db-4861-aa2a-af2d6350004f/disclosee`. The page title is "My Profile" and the user is identified as "Dennis Gabriels". The navigation menu includes "Dashboard", "Disclosures", "Reporting", and "More". The main content area is titled "Profile" and "Disclosure Form". On the left, a "Sections" sidebar lists "Definitions", "Disclosure Questions", "External Professional Activities for Pay", and "Certification & Acknowledgement" (highlighted in blue with a red '1' icon). The "Certification & Acknowledgement" section contains two text boxes. The first box contains the text "I certify that the provided information is factual and accurate". The second box contains the text "I agree to the above certifications and acknowledgements." with an unchecked checkbox. "Previous" and "Next" buttons are visible at the top right of the section. A "Submit" button is present in the top right corner of the page but is currently disabled.

12. This will unlock the “Submit” button. Click on “Submit.”

This screenshot shows the same web browser window as the previous one, but the checkbox in the "Certification & Acknowledgement" section is now checked. The "Submit" button in the top right corner of the page is now highlighted with a red circle, indicating it is active and ready to be clicked. The "Previous" and "Next" buttons remain visible in the section header.

13. Click “Proceed” to route your disclosure to the Office of Research.



Your annual disclosure has now been submitted. You will be notified by a system email on any updates with your disclosure. You will also get a “Disclosure Complete” notification once your disclosure has been fully processed and approved.

If you have any questions, please contact us at [coi@appstate.edu](mailto:coi@appstate.edu).