



## HOW TO REVIEW AND APPROVE AN ANNUAL COI DISCLOSURE IN CAYUSE

1. Go to <https://appstate.app.cayuse.com/>
2. Under “Disclosures Assigned to Me”, click on the disclosure you would like to review.

The screenshot shows the Cayuse web application interface. The browser address bar displays [appstate-luat.cayuse.com/coi#](https://appstate-luat.cayuse.com/coi#). The page title is "Cayuse Outside Interests". The navigation menu includes "Dashboard", "Disclosures", "Reporting", and "More". The main content area is titled "Disclosures Assigned to Me" and contains a table with the following data:

Disclosure Name	Disclosee	Type	Date Assigned
<a href="#">Annual - 2021</a>	Ryan Dodd	Annual Disclosure	07/20/2021 4:15 PM

A red arrow points to the [Annual - 2021](#) link in the table. Below this section is another section titled "No Reviewer Assigned" with a table containing five rows of disclosure data:

Disclosure Name	Disclosee	Type	Submission Date
<a href="#">Annual - 2021</a>	Dennis Gabriels	Annual Disclosure	06/04/2021 4:42 PM
<a href="#">Research-Based Disclosure</a>	Dennis Gabriels	Research-Based Disclosure	06/04/2021 4:50 PM
<a href="#">Annual - 2021</a>	Dennis Gabriels	Annual Disclosure	06/07/2021 12:21 PM
<a href="#">Annual - 2021</a>	Dennis Gabriels	Annual Disclosure	06/10/2021 2:35 PM
<a href="#">Annual - 2021</a>	Dennis Gabriels	Annual Disclosure	06/15/2021 2:26 PM

### 3. Review each section of the form.

The screenshot shows the Cayuse Research Suite interface for a COI Disclosure form. The browser address bar shows the URL: `appstate-tuat.cayuse.com/coi/disclosure/form/1715447-5d94-4801-8bd6-aff634cc40e3`. The page title is "Cayuse Outside Interests". The navigation menu includes "Dashboard", "Disclosures", "Reporting", and "More".

**My Tasks:**  
[Review disclosure and confirm your review \(Required\)](#)

**Disclosure Information**

- Date Submitted: 04/29/2021
- Type: Annual Disclosure
- Status: Under Review

**COI Disclosure Answers** | Documents | Process History

**COI Disclosure**

**Sections**

- Definitions ❌
- Disclosure Questions ✅
- Compensation or Expense Reimb...** ✅
- Certification & Acknowledgement ✅

**Compensation or Expense Reimbursement** Previous Next

Please indicate the external organization that provided compensation or expense reimbursement.  
Click on 'Add New Relationship' button to identify the external organization

Select Organization \* ✕ Delete Relationship

Pfizer Inc  
 ✕ clear

What is the monetary value of compensation? (If not known, enter 'N/A')

Nature of compensation

+ Add New Relationship

### 4. Under "My Tasks", click on "Review disclosure and confirm review".

This screenshot is identical to the one above, but with a red arrow pointing to the "Review disclosure and confirm your review (Required)" link in the "My Tasks" section.

5. Enter your comments in the pop-up screen and click on “Confirm Review”

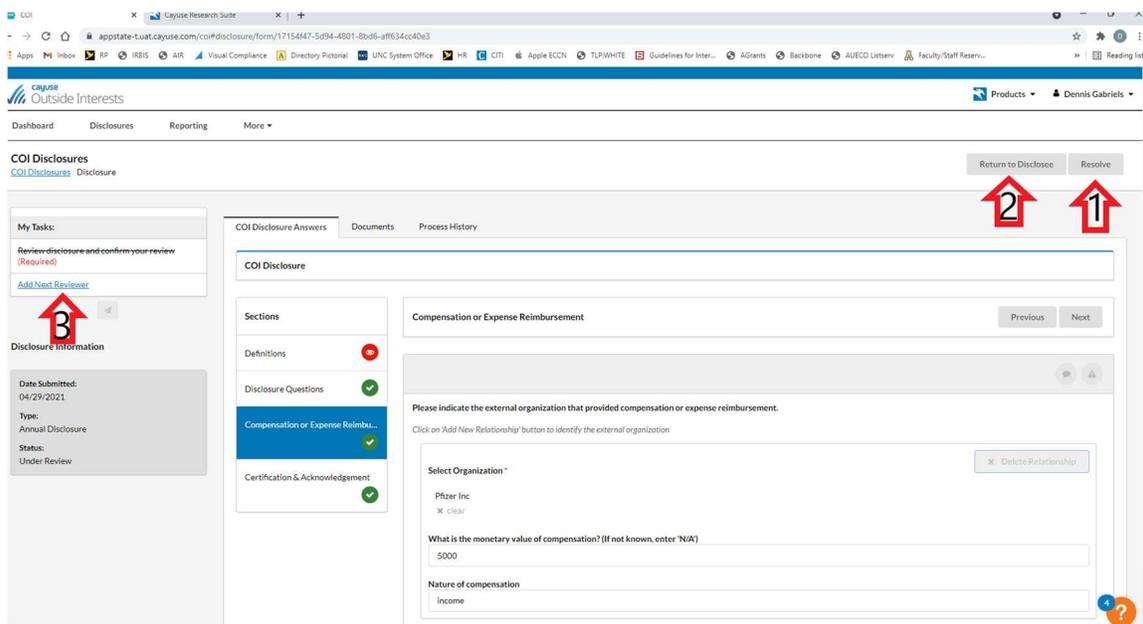
**Confirm that your review is complete** ✕

Would you like to confirm your review? You will only be able to perform this confirmation once. You must leave a note on your review to continue.

Add optional comment here

CancelConfirm Review

6. You can process the disclosure in the following 3 ways:



- 1) Resolve the disclosure. See the section “Resolve a disclosure” below
- 2) Return the disclosure to the Disclosee (if the form needs updating)
- 3) Assign a “Next Reviewer”.

## 7. Resolve a disclosure

- 1) Determine if a Conflict of Interest is present and if so, if it is manageable.
- 2) If a COI Management Plan has been completed, attach it to the disclosure by clicking on the “Documents” tab and Uploading the signed Management Plan

The screenshot shows a web browser window with the URL [appstate-tuat.cayuse.com/coi/disclosure/documents/17154447-5d94-4801-8bd6-aff634cc40e3](http://appstate-tuat.cayuse.com/coi/disclosure/documents/17154447-5d94-4801-8bd6-aff634cc40e3). The page title is "Cayuse Outside Interests" and the user is logged in as "Dennis Gabriels". The navigation menu includes "Dashboard", "Disclosures", "Reporting", and "More". The main content area is titled "COI Disclosures" and has a "Return to Disclosure" and "Resolve" button. The "Documents" tab is selected, showing a table with columns "Document Name", "Uploaded", and "Document Type". The table is empty, with a message "No entries." and a dashed box for uploading files. A "Drop files here to upload or Upload File" button is visible. On the left, there is a "My Tasks" section with a task "Review disclosure and confirm your review (Required)" and a "Disclosure Information" section with details: "Date Submitted: 04/29/2021", "Type: Annual Disclosure", and "Status: Under Review".

- 3) Click on “Resolve”, and select the resolution on the screen below

The screenshot shows a "Disclosure Resolution" dialog box with a blue header and a close button. The "Resolution" section has three radio button options: "COI determined and managed", "COI determined and unmanageable", and "No COI determined". At the bottom, there are "Cancel" and "Resolve" buttons.

Once the disclosure has been Resolved, the process has been completed.

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