

Cayuse Outside Interests – User Reference Sheet

Annual Conflict of Interest (COI) Disclosure Form

The Annual COI Disclosure Form is submitted via Cayuse Outside Interests, which is an interactive web application. As you answer questions, new sections relevant to the type of required disclosure applicable to you will appear on the left-hand side of the page. Therefore, not all sections will apply to all people. You do not have to finish the disclosure in one sitting. All information can be saved and submitted at a later time.

When Do I Need to Disclose

All research investigators must disclose their institutional responsibilities and any actual or potential interests that could be perceived to be related to any of their institutional responsibilities annually to the Office of Research at Inova (ORI).

Additionally, investigators are required to update/modify COI disclosures within *thirty (30) days* of a newly discovered or acquired significant financial interest.

The ORI reviews all submitted COI Disclosures:

- Prior to an application, project, or contract being submitted for proposed funding;
- Prior to expending funds for a new award (grant or contract);
- Upon joining a project/award/contract team engaged in funded research or scholarly and/or educational/program activities funded under external grants, contracts, or cooperative agreements;
- Within 30 calendar days if a new significant financial interest is discovered or acquired (e.g., through activity, purchase, marriage, or inheritance); and,
- Upon transfer to Inova of an externally funded award, contract, or cooperative agreement from another institution or entity.

Required COI Training

Each Investigator is required to complete Conflict of Interest training prior to engaging in research or externally-funded educational activities, at least every four (4) years, and immediately when any of the following circumstances apply:

- Inova revises its COI policies or procedures in any manner that affects the requirements of Inova Investigators;
- An Investigator is new to Inova; or,
- Inova finds that an Inova Investigator is not in compliance with Inova's COI policy or management plan.

Conflict of Interest (COI) training is provided through the Collaborative Institutional Training Initiative (CITI) for both Inova-employed team members and any Inova affiliates: <https://www.citiprogram.org/>

[Click here](#) to review Inova's Conflict of Interest Policy for Research and Public Health Service Funding.

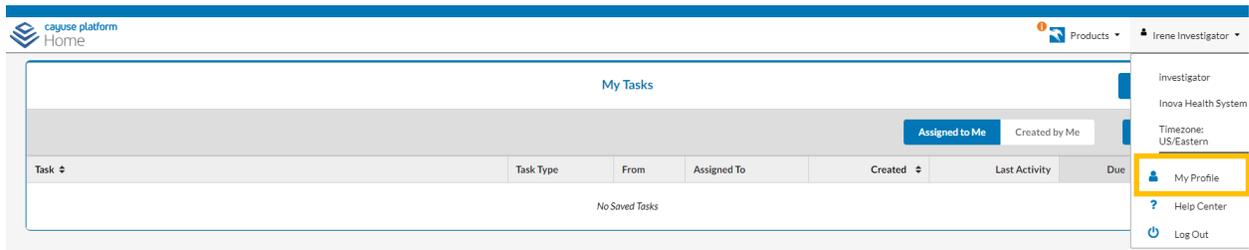
[Click here](#) to review Inova's Research Education and Training Requirements.

Questions?

Please email coi@inova.org with any questions about disclosure requirements and the submission system.

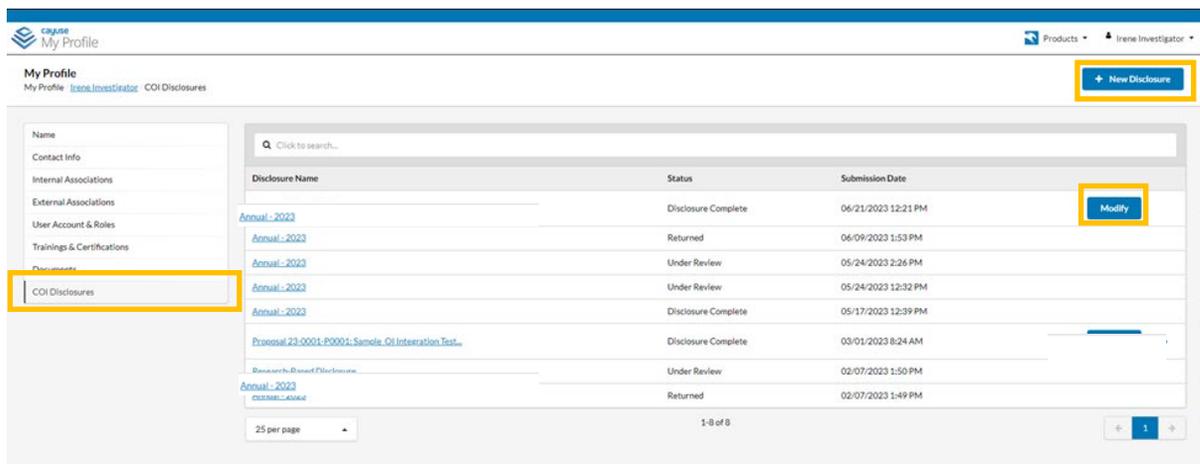
1. Log into Cayuse Research Suite

- To access test environment, visit <https://inova.app.cayuse.com> and login credentials using either the Google Chrome or Microsoft Edge browser.
- Once logged in, select “  My Profile” in the drop-down menu of in the upper-right corner by username.

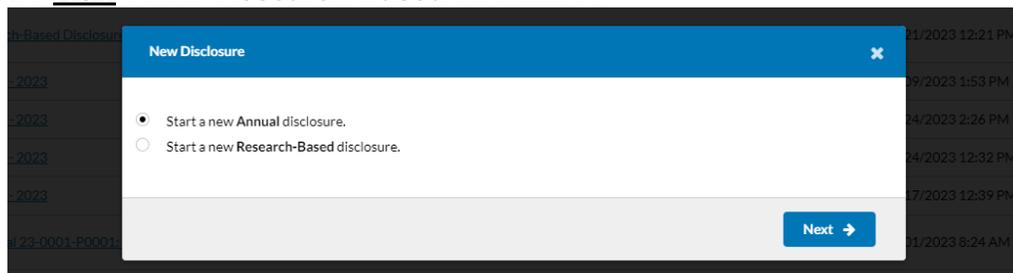


2. Create a New or Update an Annual COI Disclosure Forms

- To submit a **new** Annual Disclosure Form, select “COI Disclosures” on the left panel, then  in the upper-right corner under username (see **yellow** highlighted boxes below).



- Select “Start a new **Annual** disclosure.” and click  . Do **NOT** select “**Research-Based** disclosure”.



- c. To **update/modify** a previously submitted and approved Annual Disclosure Form, select to **Modify** the right of the disclosure name.
- i. **Note:** A modification must be submitted within thirty (30) days of a newly discovered or acquired significant financial interest. At this time, please review previously submitted answers to ensure all information is up to date as necessary.

3. Complete and Submit an Annual COI Disclosure Form

- a. The first screen that will open to “General Information” which will require review and attestation. Once attestation is complete, new relevant sections will appear as subsequent questions are answered.

The screenshot shows the 'General Information' section of the Annual COI Disclosure Form. The left sidebar indicates that 'General Information' is step 1 and 'Disclosure Questions' is step 2. The main content area includes the following text:

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When Do I Need to Disclose:
 All research Investigators must disclose their institutional responsibilities and any actual or potential interests that could be perceived to be related to any of their institutional responsibilities annually to the Office of Research at Inova. Additionally, Investigators are required to update COI disclosures within thirty (30) days of a newly discovered or acquired significant financial interest.

Required COI Training:
 Each Investigator is required to complete conflict of interest training prior to engaging in research or externally-funded educational activities, at least every four (4) years, and immediately when any of the following circumstances apply:

- Inova revises its COI policies or procedures in any manner that affects the requirements of Inova Investigators;
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Attestation *
 I attest that I have read the above information.

**The red numbers indicate items that need to be completed before selecting “Next”.

- b. Please be sure to read the instructions and answer all questions that appear with a red exclamation mark (❗). A green check (✅) will appear next to each section once all questions have been answered.

The screenshot shows the 'Disclosure Questions' section of the Inova My Profile. The left sidebar lists sections with their respective counts: General Information (1), Disclosure Questions (1), Research Activities (2), Remuneration or Compensation (8), Equity Interests (4), Reimbursed or Sponsored Travel (4), Intellectual Property (IP) (4), and Attestation (1). The main content area is titled 'Disclosure Questions' and contains the question: 'What is your role at Inova? (check all that apply)'. Below the question is a list of roles with checkboxes: External Collaborator, Principal Investigator, Project/Program Director (as identified in a PHS grant application), Research Team Member (as identified in an IRB application) [checked], Senior/Key Personnel (as identified in a PHS grant application), Sub-Investigator, Other, and I currently am not involved in any research.

- i. If you answered “Yes” to any of the Disclosure Questions, additional sections will be displayed (e.g., “Remuneration or Compensation”, “Equity Interests”, “Reimbursed or Sponsored Travel”, and “Intellectual Property (IP)”).
- c. To disclose external professional activities, select the appropriate section to answer additional required questions:
 - i. Click [+ Add New Relationship](#), then “Find external organization” to select the organization to which you have a significant financial interest.
 1. To search for the organization, type the name in the highlighted box below with the magnifying glass to select the correct. Select and click “Save”.

External Org Finder

Click to search

Q Click to search...

Name	
100WomenStrong	+
4SC AG	+
AADi, LLC	+
ACADIA Pharmaceuticals, Inc.	+
ACT for Alexandria	+

1-5 of 1044

Prev Next

Cancel + Request New External Org Save

2. Once organization is selected, answer the remaining questions. See below for example.

Select Organization * x Delete Relationship

No external organization selected. [Find external organization](#)

Who is the person(s) with a relationship with this organization? *

Self

Spouse/Domestic Partner

Dependent Children

What is the purpose of the trip(s)?

Is this domestic or international? *

Select a value...

How much will be received for this travel? *

\$

What is the departure date? *

MM-DD-YYYY

What is the return date? *

MM-DD-YYYY

Please select which of the below is involved. *

Travel within the twelve (12) months preceding the date of this disclosure

Anticipated/Future Travel

Both

+ Add New Relationship

- ii. Click + Add New Relationship to repeat this process if multiple organizations need to be added.
- iii. Once all questions have been completed, a green check () will appear next to each section.

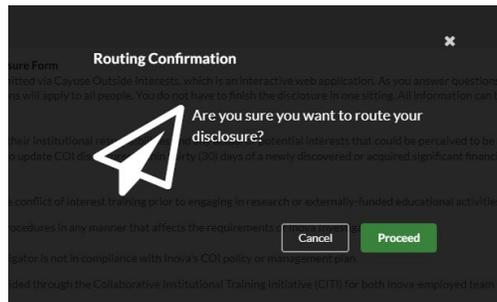
4. Attestation

- a. All sections should have a green check (✓) before completing this section.

- b. Be sure to read each statement before checking the box “I attest”. Only check the box if the above statements are true.

5. Submit and Route Completed Annual Disclosure for Review

- a. Once Attestation is complete,  will be unlocked in the upper right-hand corner.
- b. Click , then  to route your disclosure to the ORI.



- c. Notifications will be sent via email on any updates with your disclosure.
- If a Management Plan is required, the document will be routed via DocuSign for your review and signature.
 - Once the Management Plan has been signed, the ORI will upload the signed document to your user profile for future reference.

For questions, please email COI@inova.org.