Streamlyne Conflict of Interest Module

How to submit your Annual Disclosure

All UNC faculty, administrators and exempt staff must complete their Annual Disclosure by October 15th of each year.

1. Access Streamlyne by typing research.unco.streamlyne.org into your web browser.
2. Login using your UNC email address and associated network password.

3. To start a new Annual Disclosure, click on Main Menu  Conflict of Interest  the + next to Annual Disclosure.

4. On the Annual Disclosure page, under Document Overview, add your last name and the current year to the Description field.

5. Under Reporter, you will find your contact information that has automatically been pulled in from Banner. No actions are needed in this section.

6. In the Screening Questionnaire section, click ‘Show’ next to Financial Entities Screening.
7. Answer the question to the best of your knowledge. Some of the questions have further information and policy/regulation references if you click on ‘More information...’ to the right of the question.

8. Once you have answered all questions in the Screening Questionnaire, click ‘Show’ next to COI Annual Disclosure in the Questionnaire section.

9. Please read each question thoroughly and answer all the questions in the COI Annual Disclosure to the best of your knowledge and as honestly as possible.

10. No actions are needed at this time in Projects to Disclose or Notifications. You may skip these sections.

11. If you would like to add any notes or comments to further explain your answers in the Questionnaires, you can create a Note in the Notes & Attachments section. To do this, please complete the required fields (identified with an * next to them).
a. Add a short description in the Note Topic field.
b. Add any notes or comments in the Comments text box.
   The text box can be expanded by clicking on the icon.
c. Click .

12. If you have any corresponding materials you would like to include, please add them in the New Attachment section of Notes & Attachments. Again, only the fields noted with an * are required, but you are welcome to complete as much information as you like. At a minimum, please,
a. Select the Attachment Type from the drop down menu.
b. Include a Description.
c. Add your file by clicking on 
   
d. Then click .

13. Finally, please certify your disclosure by opening up the Certification tab. Please read through the certification statement, then click the box next to “I certify that…”. Once you have checked the box, please click .

If you indicated in your Screening Questionnaire that you have financial entities to report, the following statement will appear after you have submitted your certification.

Based on answers to the screening questionnaire you are required to have at least one active financial entity to submit this disclosure. Would you like to add a financial entity at this time?

Please click “Yes” to add one or more financial entities. If you need to
gather additional information and are unable to add the financial entity at this time, you can click “No”. You will be taken back to the Annual Disclosure, where you can click Save at the bottom of the screen and come back at a later time. **Please note that your Annual Disclosure has not been submitted and you will need to come back to complete it before October 15th.**

If you click “Yes” to add a new financial entity, step-by-step instructions are below.

**Adding a Financial Entity**

To add a new financial entity, you will need to access the Financial Entities page. You can do this in one of two ways:

a. Click “Yes” as indicated above, after submitting your Certification OR
b. Click on Main Menu → Conflicts of Interest → the + next to Financial Entity.

1. In the Financial Entities module, you will see different pages listed on the left-hand side – Financial Entity, Reporter, Financial Entity Actions.
Financial Entity: all new financial entities will be added here.

Reporter: this page contains your contact information and is pulled in from Banner. No actions from you will be needed on this page.

Financial Entity Actions: on this page, you can complete a validation check to determine any errors, view the Route Log, and submit your Financial Entity.

2. Go to the Financial Entity page, if you are not already there.
3. Enter a short description in the Description field of the Document Overview section. This can be the entity name, the type of entity, or even just “Entity 1”.
4. In the Financial Entity Details section, complete all the required fields, as noted by an asterisk (*). When adding a new entity, the Status Code should be listed as ‘Active’. If at some point in the future, you no longer have a relationship with this entity, you can come back into Streamlyne and mark the Status as ‘Inactive’ on the View/Edit Financial Entities page.
5. Next, please answer all questions in the Questionnaire section.
   Click Show next to each of the questionnaires – Financial Entity Required Questions and Financial Entity Optional Questions - to open them. Please use “N/A” for any questions that do not apply to your situation.
6. Next, click on the Relationship Details tab to open it. Here you will provide details regarding your, your spouse’s, and/or your dependent child’s relationship with the entity you listed above.
You will only need to complete the options that apply. Please use the drop down menus and check boxes as needed. Any related notes can be added into the Comments text box.

7. If you have any additional documentation you would like to include, you can open the Attachments tab and add it there by including a Description, selecting Choose File to add your file and then clicking Add.

8. Once all details for the entity have been completed, please click Save at the bottom of the page.

9. Next, on the left hand side of the page, click on **Financial Entity Actions**. Then click Submit at the bottom of the page.

10. If you came to the **Financial Entity** page via the Annual Disclosure, once you hit Submit, you will be taken back to your **Annual Disclosure**. Please go to the Certification tab once more, check the box next to “I certify…” to certify your disclosure, and click Submit next to your name.

11. If you are not taken back to your Annual Disclosure, and you have not certified and submitted your disclosure yet, you can access it by returning to your Action List, then clicking on the Id number next to your COI Disclosure that is pending completion.
12. Thank you for completing your annual disclosure! The status at the top of your screen should now appear like this to indicate you have successfully certified and submitted your disclosure.

Your disclosure will be reviewed for any potential conflicts of interest or commitment. If any additional information is needed, you will be contacted. For questions or assistance completing your disclosure, please contact Nicole Morse, Research Compliance Manager, at nicole.morse@unco.edu or 351-1910.