

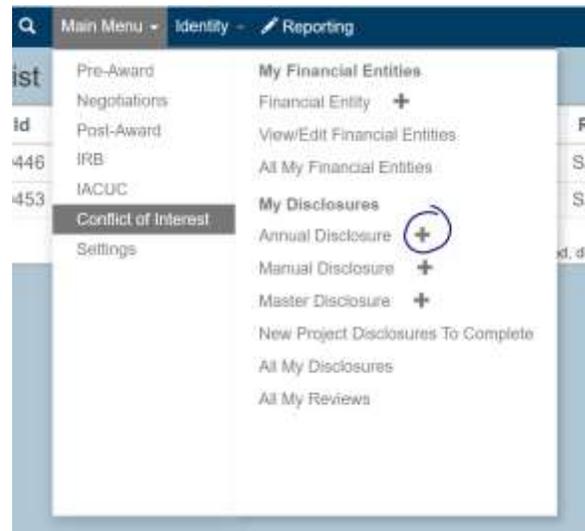


Streamlyne Conflict of Interest Module

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.

Screening Questionnaire

Home Financial Entities Screening (Incomplete)

Questions Next

Do you, your spouse/partner, or any dependents, to the best of your knowledge, have a relationship with any Entity in which you, your spouse, or any dependents have a Significant Financial Interest (SFI) that reasonably appears to be related to your Institutional Responsibilities? [More information...](#)

SIGNIFICANT FINANCIAL INTEREST is considered to include:

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.

Questionnaire

Home Annual COI Disclosure (Incomplete)

Questions Next

Are you the author or co-author of a textbook or other academic material(s), not including Open Educational Resources, published by an outside entity that is being used at UNC? Open Educational Resources (OER) are teaching, learning, and research materials in any medium that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation, and redistribution by others with no or limited restrictions. [More information...](#)

Yes No

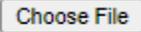
10. No actions are needed at this time in **Projects to Disclose** or **Notifications**. You may skip these sections.
11. If you would like to add any notes or comments to further explain your answers in the Questionnaires, you can create a Note in the **Notes & Attachments** section. To do this, please 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.

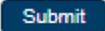
The text box can be expanded by clicking on the  icon.

- 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 * File Name :  .

- 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

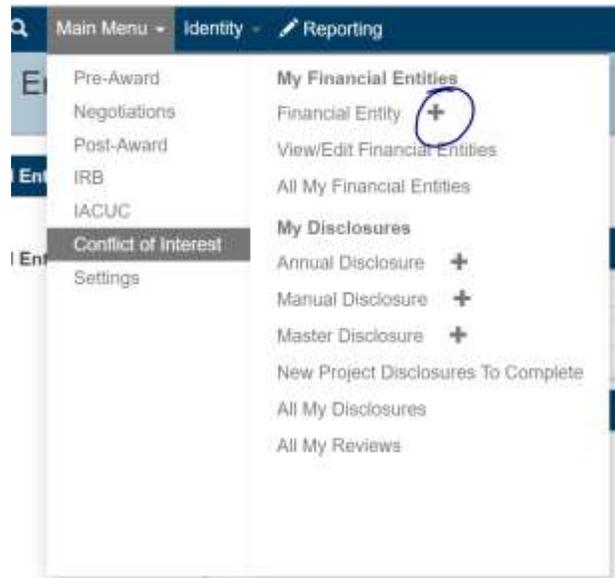
gather additional information and are unable to add the financial entity at this time, you can click “No”. You will be taken back to the Annual Disclosure, where you can click Save at the bottom of the screen and come back at a later time. Please note that your Annual Disclosure has not been submitted 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 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.

Action	Id	Type	Title	Route Status	Delegator	Date Created	Group Request	Actions	Log
FYI	8846	Streamlyne Research Notification	Annual COI Disclosure Reminder	FINAL		12:34 AM 09/09/2020		NONE	
COM	49459	KC COI Disclosure	KC COI Disclosure - Testing 2021-2022	SAVED		02:01 PM 09/24/2021			

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.

Document Number : 49459 Disclosure Number : 1448
 Disclosure Status : No SFI Review Status : Auto-Approved
 COI Disposition : No Conflict Exists Reporter : [REDACTED]

- Document was successfully submitted.
- Disclosure has been certified.

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.