CU BOULDER – InfoEd

COIC – PI Disclosure Guide

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Preface:
This guide provides an overview of how a PI navigates and submits a Disclosure of External Professional Activities (DEPA) Form in InfoEd for the Conflicts of Interest & Commitment Office (COIC).

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1. Log in to InfoEd

Step 1: Login to Boulder VPN

Step 2: Go to https://era.cu.edu.

Step 3: Select Boulder from the campus drop-down menu.

Step 4: Enter your IdentKey and Password. Click Log in.

2. Navigate to the DEPA Form

Step 1: Click DEPA Form in the left-side menu on the Home page.

Step 2: Click Create/Update DEPA Form when the screen refreshes.
3. Complete Conflict of Interest and Commitment (COIC) Training

You must complete the required COIC training before creating a DEPA Form. You must play the video in its entirety to access the DEPA Form.

**Step 1:** Click **Access Training Video** to watch the training video. Close the video window when the video has completed.

**Note:** A transcript of the training video is also available on this screen.

**Step 2:** Once you have completed the training, the “**Create Initial DEPA Form**” button will be available for selection.
4. Create or Edit the DEPA Form

Once you have completed the required training, you can create and submit a disclosure.

If this is your first submission:

Step 1: If this is your first submission, click Create Initial DEPA Form after you have completed the training above.

If you have partially completed your disclosure:

Step 1: If you have partially completed, but not submitted, your disclosure and would like to complete your disclosure, click DEPA Form in the left-side menu on the Home page.

Step 2: Click Create/Update DEPA Form when the screen refreshes.
Step 3: Click **Edit/Submit Current DEPA Form**.

If you have already completed your first submission and would like to update your disclosure:

**Step 1:** If you have already completed your first submission and would like to update your current disclosure, click **DEPA Form** in the left-side menu on the *Home* page.

**Step 2:** Click **Create/Update DEPA Form** when the screen refreshes.
Step 3: Click Recertify or Update DEPA Form.

ATTENTION: Do NOT select the “Recertify or Update DEPA Form” button to VIEW your DEPA Form. This will create another submission of the DEPA Form. If you need to VIEW your DEPA Form, please see Section 11. View Any Previous Disclosure on how to navigate to your previous Submissions.

5. Create a DEPA Form

Once you have navigated to the DEPA Form, you can create and submit a disclosure.

Step 1: It is recommended to click ALL PAGES in the left-side menu to display all fields you might need to complete when you originally create a disclosure.

Note: All sections of the DEPA Form are listed in the left-side menu.

Step 2: Below is a description of each option in the toolbar.

- **Close** – Allows you to exit the form. The form auto-saves, so you can exit the form if you are not yet complete and return to it at a later time if needed. Your previous selections will be saved.
- **Print** – Allows you to print your form in its entirety.
- **Form History** – Gives you the ability to see the history of your form submissions and compare to previous submissions.
- **Certify & Submit** – Submits the form to the COIC Office. *This button is located at the bottom of the form.*
Step 3: Fill out the form in its entirety.

Note: The DEPA Form reveals additional questions depending on your answers to the previous questions. All fields that appear on the form are required.
6. Entity Information

There are multiple places in the DEPA Form where you could be asked to enter entity information regarding activities with external entities. These appear as tables in the form that appear based on answers to previous questions. See steps below for creating entity information in the form.

Search for an Existing Entity:

Step 1: Start typing the **Entity Name** in the field listed below the **Entity Information** heading.

Step 2: Select your **Entity** when it appears in the list, then click **Add Entity**.

Note: If your **Entity** is listed twice in the list, please select the **Entity** that does not have an asterisk (*) behind its name. Then click **Add Entity**.

Step 3: If your **Entity** does not appear in the list, type “**Entity not found**” in the field listed below the **Entity Information** heading. Select “**Entity Not Found**” from the list, then click **Add Entity** to the right of the field.

Step 4: Fill out the **Entity Information** in the table for your particular **Entity** in its entirety.
**Adding an Entity That Does NOT Appear In The List:**

**Step 1:** If your **Entity Name** does **NOT** appear in the list when you enter it into the field listed below the **Entity Information** heading, do the following.

**Step 2:** Type **“Entity Not Found”** into the text field listed below the **Entity Information** heading.
Step 3: Select "Entity Not Found" from the list.

Step 4: Select "+ Add Entity" button after you have selected "Entity Not Found" from the Entity list.

Step 5: Fill out the table its entirety and enter your Entity Name into the “Type Entity Here” field.

Add Multiple Entities:

Step 1: If you have more than one Entity to add, search for an Existing Entity to see if it already exists, or add a New Entity by following the instructions above. Then click Add Entity to add any additional Entities.

Step 2: Complete the Entity Information fields for all entities in their entirety.

Note: When adding multiple entities, the new Entity Fields will appear below the existing entities.
Delete an Entity:

**Step 1:** Open the DEPA Form and scroll to the entity you would like to delete.

**Step 2:** Click the Trash Can/Delete Entity icon at the top of the table to the right of the **Entity Name** you wish to delete.

**Step 3:** When prompted if you are sure you want to remove the item, select the “OK” button.

![](image)

7. **Save a Disclosure**

**Step 1:** The DEPA Form auto-saves, so if you need to come back to your form at a later time to complete it, select the “Close” button.

**Note:** This is a great option if you have most, but not all, of your disclosure information.

![](image)

8. **Submit a Disclosure**

**Step 1:** Once the form is filled out in its entirety, select the “Certify and Submit” button at the bottom of the form.
Note: The Certify and Submit button forces a validation to ensure all mandatory fields are complete.

Step 2: If you have mandatory fields that have not yet been completed, a pop-up window will appear listing the fields that still need to be completed. You can go directly to the fields by clicking on the item still required to complete in the pop-up. Please enter the information for these fields.

Note: If you happen to have missed an Entity field, and your Entity is collapsed, you will receive the mandatory field pop-up with the descriptions of the fields you missed.

Step 3: Once all mandatory fields have been completed, select the **Certify and Submit button** at the end of the form.

Step 4: Once the form has been submitted, you will be returned to the form. Click **Close** to close out of the form.

Step 5: Await response from the COIC Office.

Note: After you have Submitted and Closed out of the form, you will be returned to the **Create/Update DEPA Form** window.
9. Print a Disclosure

Step 1: Log in to InfoEd and open the DEPA Form.

Step 2: Click Print in the toolbar.

10. View Last Disclosure

Step 1: After clicking on DEPA Form, click Create/Update DEPA Form.

Step 2: Click View Last DEPA Form on the Create/Update Disclosure window.

Step 3: You can View but not Edit your disclosure.
11. View Any Previous Disclosure

**Step 1:** After clicking on *DEPA Form*, click *Show My Records*.

**Step 2:** Click the **Record Number** link to view the options in the drop-down.

**Step 3:** Select **View** from the drop-down menu.
Step 4: In the new window, click the **Plus Sign** next to **Submissions** in the left-side menu.

Step 5: Select the **Submission Date** for the according disclosure.

Step 6: Click **View** (eye-glasses icon).

Step 7: You can View but not Edit your disclosure.
12. Communications from the COIC office

Email Communications

After you have submitted your DEPA Form, you will receive email communications from the COIC office regarding your disclosure.

**Step 1:** These emails will be sent to the email address that is listed in the **My Profile** section.

**Step 2:** To validate your address, navigate to **My Profile** and verify your email address.

**Step 3:** If you need to change your email address, navigate to **My Profile**, change your **Email Address**, and hit the **Save** button.
Step 4: To ensure this is listed as your **Primary Email Address**, scroll down to the **Addresses** section in My Profile, and select the **Edit** link to the right of the **Primary** radio button.

Step 5: In the Edit Address pop-up window, verify your **Email Address** is the one you would like to use. If it needs to be changed, change it and click the **Save** button.
Messages Widget

You can also see communications from within the application via the Messages Widget on your Home page.

**Step 1:** To add this widget to your Home page, select the Portal Configurations button in the bottom right. You may have to scroll down to see it.

**Step 2:** In the popup Portal User Preferences window, select Enable in the dropdown menu to the right of the Messages name. Click Save button. This can be disabled at any time.
Step 3: You will then see the Messages widget on your Home page.

Step 4: To view a Message, simply click on the message you would like to read.

From: Office, COI
To: Test, PI_UCB - 10000--Boulder Campus
CC: Office, COI - B0001--Boulder Campus
Subject: Review of Your DEPA

Thank you for submitting your 2021 Disclosure of External Professional Activities (DEPA) Form. Please review the entirety of the attached letter, which contains details regarding your DEPA status, policy reminders, as well as resources. Please contact the COIC Office if you have any questions or concerns.
Communications Tab

You can also view Communications from the office via the Communications tab within your records.

**Step 1:** From the Home page, select **DEPA Form** in the left hand menu.

**Step 2:** Select **Show My Records**.
Step 3: Select the Record Number hyperlink, then select View.

Step 4: Select the Communications tab.

Step 5: To view a Communication, simply select the Detail icon for the associated message. You can do the same for the Attachments.

Note: There will be other interoffice COIC communications that relate to the progress of your DEPA Form that are here, which are related to the status history. You can ignore these.
13. Conflict of Interest and Commitment (COIC) Contact Info

Should you have questions regarding this form, you can contact the COIC office through the means below.

Conflicts of Interest and Commitment Office
PHONE: 303-492-3024
EMAIL: coi@colorado.edu