



UTSA Annual Disclosure of Financial Interests and COI Training

Step 1 –Go to <https://oric.utsa.edu> and login using your myUTSA account (Researchers must complete COI training at least every four years thereafter).

Welcome to the UTSA Research Conflict of Interest Portal Home

All UTSA Tenured / Tenure Track faculty members and UTSA researchers are required to file a disclosure of financial interests for the current calendar year by March 1 and update the disclosure within thirty (30) days as new, reportable Significant Financial Interests are obtained and/or identified. If you have any questions about disclosure requirements as they apply to you, please contact coi@utsa.edu.

Conflict of Interest

myUTSAID:

Password:

Remember Me

Acceptable Use Policy
This computer application is the property of the University of Texas at San Antonio. Improper or unauthorized use of this application may lead to criminal prosecution or other disciplinary action. Use of this application, authorized or unauthorized, constitutes consent to monitoring of the system and the user's acknowledgement of accountability and responsibility.

If you have problems logging into the system, please contact the VPR Helpdesk at vprhelp@utsa.edu or (210) 458-7805.

[Off Connect](#) · [Campus Alerts](#) · [Required Links](#)
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- **Outside Researchers:** If you are an outside researcher (Non-UTSA), please follow these steps:
 1. To create an VPR User account, please go to <http://reeves2.it.utsa.edu/research-funding/conflict-of-interest/non-utsa-coi-training-account-registration/> and fill out the Non-UTSA COI Training Account Registration form:

Non-UTSA COI Training Account Registration

Please fill out the following information to finish your registration.

***IMPORTANT: we will use your email address to communicate with you regarding your new account information. So please make sure you enter the correct email information.**

Organization/University:

First Name:

Last Name:

Email:

Verify Email:



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- Click the **“Submit”** button. You will get the following email confirmation from VPR Help Desk within 24-48 hrs. Please proceed to Step 2.

From: vprhelp@utsa.edu [mailto:vprhelp@utsa.edu]
Sent: Thursday, October 27, 2016 3:47 PM
To: Outside Researcher
Subject: Conflict of Interest website – Access Granted

Dear _____,

You have been granted access to the Conflict of Interest Disclosure website at UTSA. You may access the site here: <http://oric.utsa.edu>.

Your username is **vpr123** and your initial password is **default_**. To ensure the security of your disclosure data, you will be prompted to change your password the first time you login.

If you have any questions or would like assistance, please contact our office at CCOI@utsa.edu.

Regards,
Electronic Research Administration (eRA) Help Desk

Step 2 – To complete the COI Training and/or submit a “New Disclosure” from your Folder Page.

- Click the **“Click Here to Complete the COI Training”** bar to open the COI Training section (1) if you need to complete COI Training or if the training already expired. **Training must be completed every 4 years.**
- Click the **“Click Here to File a New Disclosure”** bar to begin the process of filing your Disclosure of Financial Interests (2).

The screenshot shows the UTSA Office of Research Integrity website interface. At the top, there is a navigation bar with the UTSA logo and the text 'OFFICE OF RESEARCH INTEGRITY'. To the right of the logo, there are links for 'New Disclosure', 'Home', 'Welcome, Test -', and 'Log Off'. Below the navigation bar, there is a dark blue header with a hamburger menu icon and the text 'COI / Home'. The main content area features a table with the following data:

User ID	Name	Position
test2	Test 1	javiermanuelgarcia@gmail.com
		test account 2

Below the table, there are two buttons: a grey button labeled 'Click Here to Complete the COI Training' (1) and an orange button labeled 'Click Here to File a New Disclosure' (2). To the left of these buttons, there is a section titled 'COI Training Dates' with a table that has columns for 'Date' and 'Comment'. The table is currently empty, with the text 'No items to display.' below it.

At the bottom of the page, there is a message: 'There are no Disclosures to display'.

Step 3 – Answering the acknowledgement and questions on the disclosure:

- Read carefully the Researcher Acknowledgement and check the box at the bottom of the page:
 have read and understand the UTSA Acknowledgement
- Click the “Next” button to move to the next page: **“Financial Interests”**.
- Read carefully and answer the following questions on the form either **“Yes”** or **“No”** as they pertain to you and your immediate family’s situation.

Conflict of Interest / Disclosure

Discloser: Road Runner Discloser ID: vpr111 **Complete And Submit** **Close**

Disclosure

Acknowledgement

Financial Interests

Travel Payments

Publicly Traded

Non-Publicly Traded

IP Rights

Certification

UTSA RESEARCH

University of Texas at San Antonio
Disclosure of Financial Interests

Financial Interests

Answer questions as they (1) pertain to you (including any trust or foundation over which you can exercise control) or related persons for the previous 12 months AND (2) reasonably appear to be related to your institutional responsibilities at UTSA (e.g., research, teaching, administrative services, and other professional activities). Include relationships with non-profit organizations and note exclusions that need not be disclosed. See UTSA HOP 10.04 for additional information.

Click on **highlighted** terms for definitions and more information.

Are you (1) planning to submit within the next month (or have you submitted) an NIH grant proposal, and/or (2) in any way participating in an active NIH grant? (Remember: answer only for the past 12 months.)

Yes No

Did you or any related person receive any form(s) of travel payment (e.g., travel reimbursements or travel paid on your behalf) from any entity?

Yes No

Did you or any related person receive any form of payment from OR have equity interests in a Publicly Traded entity that, when totaled, equaled more than \$5,000?

Yes No

Did you or any related person receive any form of payment exceeding \$5,000 OR have ANY equity interests in a Non-Publicly Traded entity?

Yes No

Did you or any related person own, hold, receive income from, or have the right to receive income from rights to intellectual property (such as patents, copyrights or trademarks) from an entity other than UTSA?

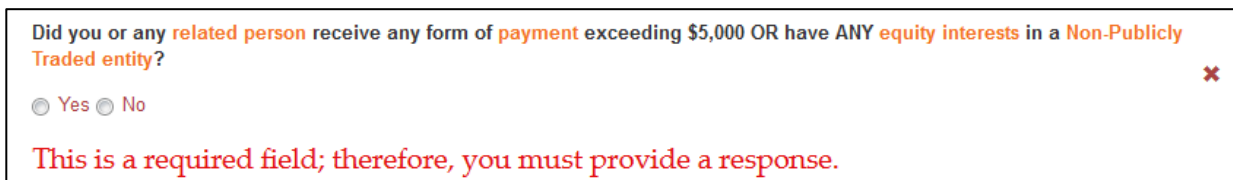
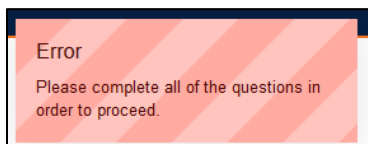
Yes No

Next >

Complete And Submit **Close**

Answering “Yes” to a question will require additional information to be entered under the corresponding “Financial Interests” section.

Important Note: If you do not answer a question on the site and/or provide additional entity information and you click “Next”, you will receive an error message on the top of the page and under the question(s) that was not answered.



Step 4 – Providing Corresponding Financial Interest (Entity) Information.

- To enter the financial interest information simply click the **“Click this button to enter a new entity”** button to begin entering information about the related outside entity/entities in which you have a significant financial interest. Do not click **“Next”** until you have added all the entities in which you have a significant financial interest (SFI).

University of Texas at San Antonio

Disclosure of Financial Interests

Payments or Equity Interests in a Publicly Traded Entity

Click the “Add” button to enter any form of **payment AND equity interests** that you or any **related person** received within the last 12 months. **Do not disclose if the aggregate of payments and equity does is less than \$5,000.**

Exclusions:

- Any interests or activities that do not appear to be related to your Institutional responsibilities,
- Travel reimbursements or sponsored travel from:
 - U.S. federal, state, or local governments,
 - U.S. institution of higher education (e.g., UTSA, UTHSCSA, and community colleges), academic teaching hospitals, medical centers, or
 - Research institutes affiliated with a U.S. institution of higher education

Click this button to enter a new entity

Update	Entity	Date	Delete
No items to display.			

Next »

After you have entered information about entity, click the **“Next”** button at the end of the page to move to the next page. Note: Any question(s) left unanswered will result in an error message in red under that question.

Conflict of Interest / Disclosure / Publicly Traded

Financial Interest: Publicly Traded Disclosure ID: Cancel ✕

Step 1Step 2Step 3

Payment made to and / or equity held by

Select type of Payment / Equity

Amount of payment received and value of any equity interest in the entity
(Please use current fair market value for equity interests if monetary value is known)
\$

Name of Entity

Entity's primary physical address (city, state & ZIP code)

Role or position or type of duty held at entity

PreviousNext

Name of entity

✕

This is a required field; therefore, you must provide a response.



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- After you have completed the information about the entity, click the **“Submit”** button to finalize the financial interest information.

****Important Note:** If you have previously submitted a disclosure, the system will pre-load saved information about any related outside entities in which you have a financial interest (note the orange “Click to update” button in the screen shot below). Please click the “Click to update” button to review and update the entity information. Please click the red “Click to delete” button to delete the entity if you no longer has a financial interest with the listed entity.

Click this button to enter a new entity

Entities listed below are from previous disclosures. Click the "Orange" button to update the entity information or Click the "Red" button to delete the entity.

Update	Entity	Date	Delete
Click to update	Publicly Traded	8/25/2016 14:29:46:440	Click to delete

****Important Note:** Please look for the pop-ups through the site.

Confirmation Needed

You are about to submit this Entity, do you wish to continue?

YES NO

Step 5 – Repeat Step 4 for each related Financial Interest.

- Repeat step 4 for each related outside entity in which you have a significant financial interest or click the “Next” button to proceed to the next financial interest which you answered “Yes” to the Financial Interest questions (step 3).

Click this button to enter a new entity

Entities listed below are from previous disclosures. Click the “Orange” button to update the entity information or Click the “Red” button to delete the entity.

Update	Entity	Date	Delete
Click to update	Publicly Traded	8/26/2016 15:31:55:727	Click to delete

Next »

Step 6 - Submitting you disclosure for review.

- Read carefully the “**Certification**” section (1), check the box at the beginning of the page and Click the “**Complete and Submit**” button (2) to finalize your submission:

Discloser: Road Runner
Discloser ID: vpr111
Complete And Submit
Close

Disclosure

Acknowledgement

Financial Interests

Publicly Traded

Certification

University of Texas at San Antonio

Disclosure of Financial Interests

Certification

(1)

certify under penalty of perjury that this is a complete disclosure of all current financial interests. I have used all reasonable diligence in preparing this Disclosure of Financial Interests and it is, to the best of my knowledge, true and complete.

I understand that I have a responsibility to update the above information throughout the calendar year or during the research and sponsored activity period within 30 days of a change in my circumstances.

By submitting this document, I acknowledge that I have read the UTSA [Handbook of Operating Procedures 10.04](#) (as applicable) that implements the U.S. Public Health Service regulations [42 CFR Part 50, Subpart F](#), Standards of Conduct provided by [Section 572.051, Texas Government Code](#), the Conflict of Interest policy under the University of Texas [Regents Rule 30104](#), and University of Texas Systemwide Policy [UTS175](#). The information I have provided is for the purpose of assuring compliance with the Federal Regulations, State Standards of Conduct, UT System Regents’ Rules and Policy, Handbook of Operating Procedures and disclosing possible conflicts of interest. I understand that it is my responsibility to comply with these policies and regulations and any other applicable law, rule, or policy governing conflicts of interest. Adherence to these policies and regulations includes responding to requests for additional information in a timely manner. I understand that all information disclosed will be available only to individuals duly charged with the responsibility for review and portions will be reported to UT System and made publicly available. However, as a public institution, UTSA must release information in accordance with and as required by Federal or Texas law, or lawful court order. This includes reporting specific information to the sponsor (e.g., NIH, NSF) if a conflict of interest is identified or in cases of non-compliance.

(2)

Complete And Submit
Close

Notification: You will be directed to the COI Home page where you will see a green box that indicates that your disclosure was successfully submitted:

Disclosure submitted Successfully



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You will also receive a confirmation email from the CCOI after submitting the disclosure of financial interest.

From: CCOI@utsa.edu
Sent: Thursday, October 27, 2016 3:52 PM
To: Discloser <Discloser@utsa.edu>
Subject: 20XX Disclosure of Financial Interests: Approved

Dear **Discloser**,

The review of your 20XX Disclosure of Financial Interests submitted on 10/27/20XX|3:51:47 PM is complete. No further action is required at this time. If you have any questions, please contact our office at 458-4233, or email us at CCOI@utsa.edu.

Thank you!

Regards,
CCOI

Thank you.

NEED ASSISTANCE?

Please contact our office at 458-4233 or email us at CCOI@UTSA.edu if you have any questions or require assistance in filing your disclosure.