User Guide: How to Access the Annual Disclosure in Cayuse

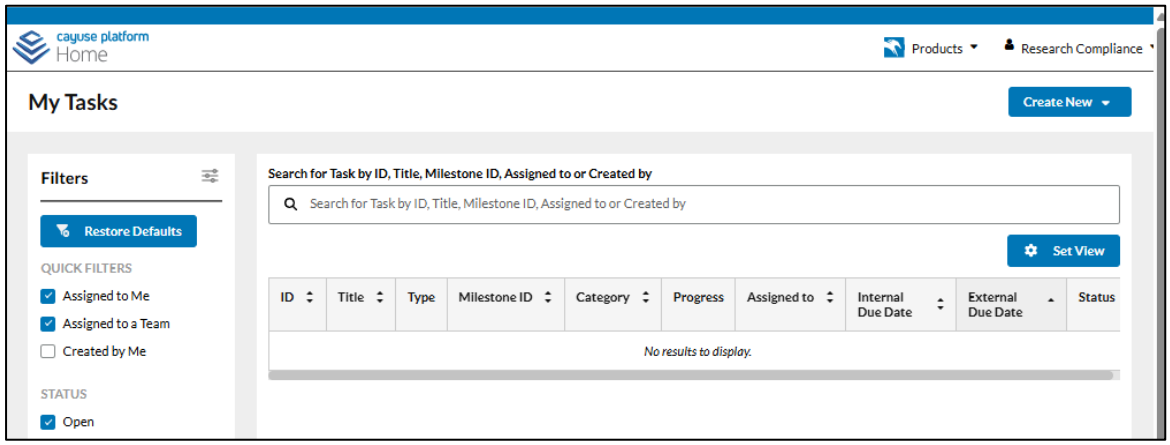
About the Annual Disclosure

An Annual Disclosure is a broad disclosure form that is not tied to a specific project. This form is required for all investigators and key personnel participating in sponsored research projects or anyone who has a Significant Financial Interest (SFI) in an entity that overlaps with their external funding, regardless of if it is federal or not.

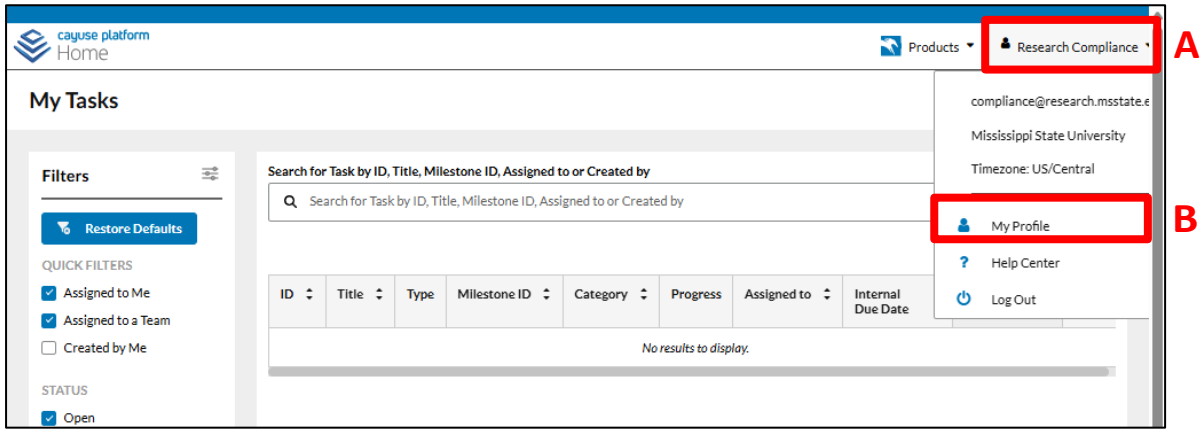
Investigators must update their disclosures annually and within 30 days of discovering or acquiring a new Significant Financial Interest.

Annual Disclosure Instructions

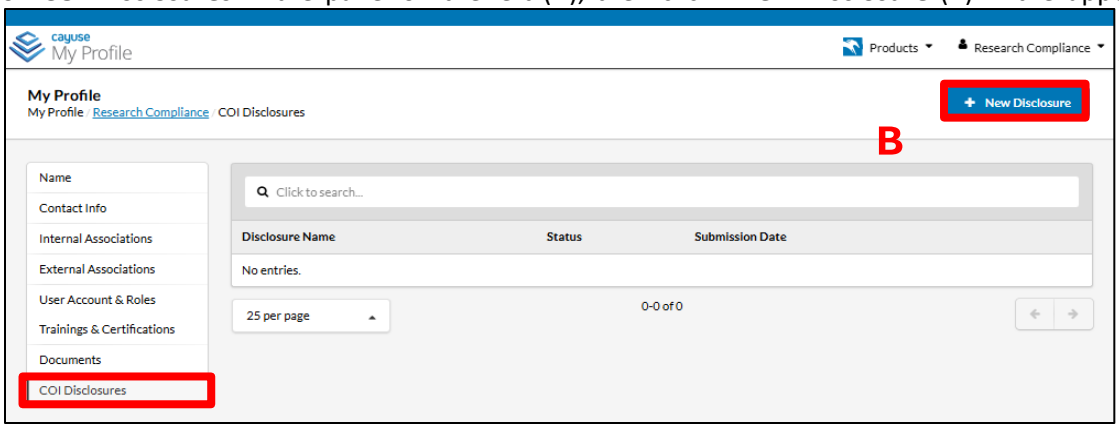
1. Go to the Cayuse Login Portal: https://wpunj.app.cayuse.com/ and use your standard WPU credentials to log in through the DUO process. You should see a home page like that below.



2. Click on your name in the upper right (A), then click **My Profile** (B).

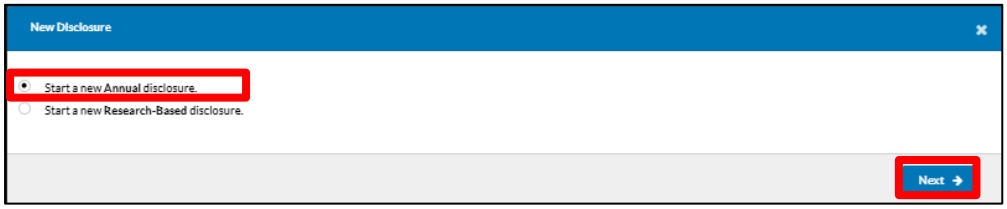


3. Click on **COI Disclosures** in the panel on the left (A), then click **+New Disclosure** (B) in the upper right.

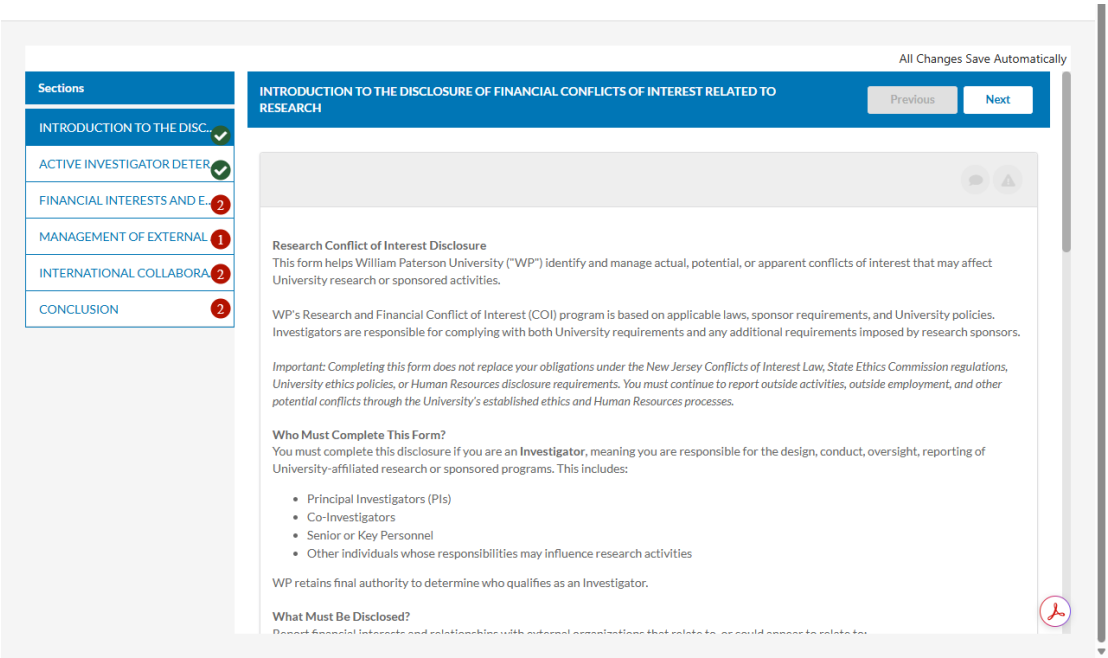


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4. A small window will appear; select **Start a new Annual Disclosure**, then click the **Next** button.



The Annual Disclosure is a dynamic form which includes several sections. Additional questions may appear based on your responses. Red numbers next to a section indicate questions or items that must be completed before you can submit the form.



5. Section 1: Introduction to the Disclosure

   This form helps William Paterson University ("WP") identify and manage actual, potential, or apparent conflicts of interest that may affect University research or sponsored activities. After acknowledgment, the red number next to the Introduction to the Disclosure section will change to a green checkmark, indicating that you may proceed. Click the **Next** button to continue to the next section.

6. Section 2: Active Investigator Determination

   This section has two required questions related to your participation in research.

7. Section 3: Financial Interests and External Entities

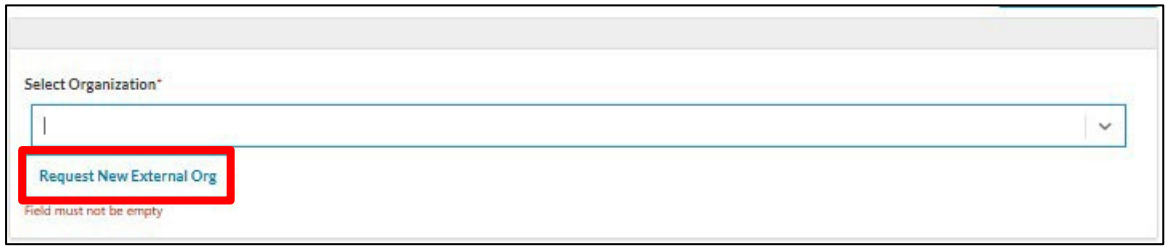
   In this section, you will be asked to identify external financial interests such as:

   - Travel/lodging sponsorship or reimbursement (not paid for by WP)
   - Intellectual Property interests (for example, income from licensing)
   - Private equity (ownership in a company that is not sold publicly, including startup and consulting companies.)
   - Public equity (ownership in a company sold on a stock exchange)
   - Remuneration (income, receipt of something with value)

   If you have one or more financial interest(s) to disclose, you will also be asked about the entity/company/organization associated with it.

   To disclose an external organization click the **Add New Relationship** button.

   Enter the organization's name in the box. If the organization is already in the Cayuse system, it will appear as you type. If it is not listed, click **Request New External Org**, enter the organization's name, and a Cayuse administrator will get it added to the system. (Note: You may continue completing and submitting your disclosure while your organization is under review by a Cayuse administrator.)



   After selecting the organization answer the set of questions as they relate to that organization.

   To report additional organizations, click **Add New Relationship** button and complete the same set of questions for each organization.

8. Section 4: International Collaborations and Interests

   This section asks about your international professional activities. You may need to Request New External Org (the steps are the same as above.)

9. Section 5: Conclusion

   The final section is where you indicate if your financial interests, external affiliations, or outside relationships have changed since your last disclosure; and certify your disclosure.

After completing all required questions, confirm that every section has a green checkmark. Then, click the **Submit** button in the upper right to submit your disclosure.

10. A confirmation window will appear asking if you want to submit your disclosure. Click the **Proceed** button to confirm. Once submitted, your disclosure will be sent for review.

