Reviewer’s Role in eCOI

How to Navigate the System
As designated in the Conflicts of Interest Policy for Wake Forest University, a “Reviewer” is responsible for reviewing and signing off on the annual disclosure of those “Members” who report to the Reviewer. This process is electronic and must be completed before the COI office can review the annual disclosure.
Log into the COI System

- The COI Office will alert you through email with a link to our eCOI system whenever you have Annual Disclosures that require your review.
- You can access the eCOI system anywhere off campus using VPN! The web address for eCOI is https://coi.wfu.edu
Log into the COI System

Outside Interest and Outside Commitment Disclosure

To prepare for completing this form, you may want to collect the following documents:

- Any consulting agreements you have signed this year
- Your stock options agreements
- Your stock portfolio summary
- Your 1099 forms for the previous calendar year (January-December)
- W-2 forms from outside employment for the previous calendar year (January-December)

Return to this site to update your disclosure at any time. Substantial changes in outside activities must be updated on the disclosure within 30 days of occurrence. Each disclosure is date stamped and archived.

If you have questions regarding the Outside Interest disclosure process, please contact the Conflict of Interest Office at (336) 716-9300 or co disclosures@wakehealth.edu.
Log into the COI System

Enter your WFU user name and password.

Login as

User Name: [ ]
Password: [ ]

Login  Remember me

After signing into this site, you are bound by the terms and conditions set forth when you received your account.
Click on the Annual Disclosure(s) in the Supervisor Review State

Click on the Annual Disclosure(s) which require your review, as indicated by the Supervisor Review “State”
Click the “View Disclosure” button to review the Member’s Annual Disclosure.
Be sure to scroll down the page to review all disclosure information.

Click "Close" to return to the previous screen.
If a management plan has been uploaded, click here to open and review.

Annual Disclosure for Melvin Fernfeather: Management Plan

- Do you have a management plan?
  - Yes ☐ No ☐

If Yes, please upload a draft here:

<table>
<thead>
<tr>
<th>name</th>
<th>description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COI Management Plan.docx</td>
<td></td>
</tr>
</tbody>
</table>

Your Management Plan will be routed as described in the University’s Conflict of Interest Policy, Appendix E. The final plan accepted and signed by the Member, Reviewer and the Committee Chair, or if appealed, approved by the President, will be uploaded by the Conflict of Interest Office. Once uploaded, the final plan will be accessible in the eCOI system.

Annual Disclosure for Melvin Fernfeather: Assurance and Certification

- I hereby acknowledge that I have read and understand the University’s Conflict of Interest Policy.
- I affirm that the information provided is to the best of my knowledge true and complete and does not misstate any facts.
- I will provide any additional information as requested by the Conflict of Interest Office.
- I have uploaded the necessary Management Plan(s) to manage, reduce, or eliminate any actual or potential conflicts of interest, if applicable. I agree to comply with the terms and conditions contained in any Management Plan(s).

* Check Yes to confirm that you understand and agree with the above statements.

After choosing yes, click "Finish" to submit your disclosure.

☐ Yes ☐ No
Click the “Supervisor Review Complete” button to complete your review.
Complete Supervisor Review

Click the radio button which corresponds to your assessment of the Annual Disclosure and add any additional comments you would like to provide.

* I have reviewed this disclosure and believe that:
  - No Conflict of Interest exists
  - A potential or actual Conflict of Interest exists
    - Clear

Additional Comments:

Click OK at the bottom to submit your review.
Supervisor Review Complete

Click “My Inbox” to review additional employee disclosures
• You will receive a monthly email if you have any new or revised disclosures which require your review

• If you have questions or need assistance in determining if a relationship is a conflict of interest, contact the COI Office (336) 716-9300 or COIDisclosures@wakehealth.edu