

Instructions for the Conflict of Interest (COI) Dashboard in Analytics

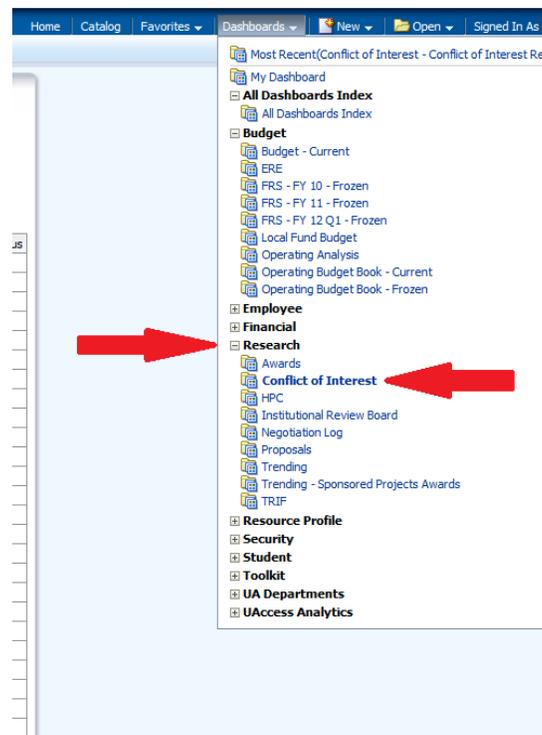
You will need Research Medium access to view the COI dashboard. For information on how to receive Research Medium access go to:

http://uits.arizona.edu/sites/default/files/Role%20Description%20Analytics_3.pdf

Go to <http://uaccess.arizona.edu/> and select Analytics / Reporting.



Log in with your NetID and password. In the blue bar at the top of the page, click on the Dashboards tab. Click the + symbol for Research and select Conflict of Interest.



What the columns mean.

The COI Dashboard has a table of data with 10 columns.

[Conflict of Interest Requirement Status](#)

EMPLID	Department	Department Name	NETID_OPRID	Last Name	First Name	Disclosure Submit Date	Disclosure Status	Training Complete Date	Training Renewal Due Date	COI Requirement Status
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- **EMPLID** = shows the individual's university identification number.
- **Department** = shows the individual's home department as indicated in his/her HR record.
- **NETID, Last Name, and First Name** are the identifying information for the individual.
- **Disclosure Status** = shows the status of the individuals disclosure. The stats types are:
 - **Annual Due** = individual has completed a disclosure and his/her annual recertification is due.
 - **Certified** = individual has completed his/her disclosure and no action is required.
 - **Not Submitted** = individual has not completed a disclosure.
 - **Undisclosed Project – SFI Reported** = individual has submitted his/her disclosure with an active significant financial interest (SFI) and a project specific disclosure is required.
- **Disclosure Submit Date** = date disclosure was last certified by individual.
- **Training Complete Date** = shows the date the individual completed his/her training. If this field is blank the individual has not yet completed training.
 - **NOTE:** The dashboard contains training data that is current as of 4:00pm the previous day.
- **Training Renewal Date** = shows the date the individual will need to renew his/her training. If this field is blank the individual has not yet completed training.
- **COI Requirement Status** = shows the status of the individuals completion of both COI requirements (training and disclosure). Status is either:
 - **Complete** = individual has completed training and disclosure his/her disclosure status shows Certified.
 - **Incomplete** = individual has not completed one of either the training or the disclosure, or has actions due on his/her disclosure.

Search Options



Home Title Department Home Title Department Description Last Name EMPLID

At the top of the screen you four options for sorting the data:

- By Home Title Department = select a department number from the list. The resulting list will show all individuals who have a training or disclosure record for that department.
- By Home Title Department Description = if you do not know the department number you can select the department name. This will yield the same search results as Home Title Department.
- By Last Name = type in the last name of an individual to see if he/she has completed and is up to date on COI requirements.
- By EMPLID = type in the EMPLID of an individual to see if he/she has completed and is up to date on COI requirements.

Once you have entered the information in the sorting options, click Apply to see results.

For questions regarding the information in the COI dashboard, or need further assistance in using the dashboard, please contact the COI office at 520-626-7879 or orcr-coi@email.arizona.edu.