

Instructions for eCOI Annual Disclosure



Annual Disclosure

As part of the Wake Forest Baptist Health community, you are required to complete an annual disclosure of outside interests and commitments.



Log into the eCOI System

- The COI Office will send you an email link to eCOI.
- You can access eCOI anywhere outside of the institution without using PORTAL! Simply go to your browser and type in <u>https://coi.wakehealth.edu</u>.



Log into the eCOI System

X Windows Security The server coi.wakehealth.edu at coi.wakehealth.edu requires a username and password. Warning: This server is requesting that your username and password be sent in an insecure manner (basic authentication without a secure Enter your connection). WFBH username & password User name Password Remember my credentials OK Cancel

Accessing your Inbox



To get started, click My Inbox at the top right of your screen

Choose your Role



Accessing your Annual Disclosure



ecoil Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu

Home Reports

Page for Marvin Fernfeather

My Roles Annual Disclosure Inbox Outside Activities Inbox

Page for Marvin Fernfeather

Welcome to your Personal Folder. Choose the correct role (Disclosure or Outside Activity) on the left side of the page to navigate eCOI.

Resources	My Inbox My Report To Status				
Conflict of Interest Policy	Complete any items found below. Once complete it will remove the item fro Filter by Name Go	m your inbox. Clear Advanced			
Conflict of Commitment	Name	Date Created	State	Date Submitted	Supervisor
roncy	Annual Disclosure Certification for Marvin Fernfeather 2019	3/26/2019 2:34 PM	Draft		James Moore
	1 items	(page 1 of 1)			10 / page
	Click on the annual disclosure certification found in your Inbox				• • • • • • •

Marvin Fernfeather

Mv Inbox

Initiating the Disclosure Process

Wake Fores Baptist Heal	st° th	COI t of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu	Marvin Fernfeather My Inbox Logoff
to begin the disclo process	osure vin	Fernfeather 2019	
Actions Edit Disclosures	Status: Draft	Type: Annual Certification ID# DC00022421	Discloser: Marvin Fernfeather Phone:
Submit Disclosure	Disclosures	History	
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To Get Started: Click on the "Edit Disclosures" button to the left, under "Actions".

Disclosure Certifications - Draft

Notes to Discloser

WFBH requires that faculty and exempt employees (including trainees, and other healthcare providers) disclose annually all outside interests, both research and nonresearch related, each April through the online disclosure process. Annual disclosure must be completed within 30 days of receipt of the reminder notification from the Conflict of Interest Office. All annual disclosures will be reviewed by the individual's department chair/section head/ director/ manager as defined by Human Resources. In the case of department chairs, the Dean of the Medical School will perform the review. One must update his/her annual disclosure within 30 days of a substantial change in external activities.

Link: COC/COI Policy

Important Points to Remember

- eCOI works best in Google Chrome or Internet Explorer
- All questions marked with a red asterisk require completion.
- New questions have been added to the Annual Disclosure.
 Carefully read all questions before you respond.
- Be sure to click the "save" button on the banner if you need to exit the system before completion of the disclosure.



Institutional Responsibilities Page

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Jse the "Back" button at		Click "Continue"
the top or bottom of the		Click Continue
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ise the "back" button on		bottom of the
your browser.	Errors Print Jump To: Institutional Responsibilities 🔻	page(s)

Annual Certification for Marvin Fernfeather : Institutional Responsibilities

The following questions apply to all activities, inpatient or outpatient. References to WFBH include activities at any WFBH space, including but not limited to hospitals, clinics, labs and office space.

1. * Are you a Doctor of medicine or osteopathy (excludes residents), dental surgeon, dentist, licensed chiropractor, optometrist, or podiatrist who writes orders and/or prescribes items or services for patients?

Yes
 No <u>Clear</u>

- 2. * Do you advise on or decide which vendor, manufacturer, service provider, supplier is chosen for purchase, lease, use or acquisition of any items or services at WFBH? O Yes
 No Clear
- 3. * Do you hold a position of executive leadership at WFBH? Ores
 No Clear
- 4. * Are you involved in the teaching, instruction, or education of students or other trainees at WFBH? O Yes
 No <u>Clear</u>
- 5. * Do your institutional responsibilities include research at WFBH? This includes, but is not limited to, being listed as an investigator on any funding proposal, awarded grant, IRB or IACUC submission.

⊖Yes
●No <u>Clear</u>

FAMILY OR CONSENSUAL RELATIONSHIPS

- 6. * Is there a family member or individual(s) with whom you have a consensual relationship employed at WFBH or one of its affiliates?
 - * Please click "Add" and complete form for each person that meets this criteria:

Add

Relationship Type Name of Person with Relationship There are no items to display Supervisor Or Collaborator with

Description of Supervisory or Collaboration

ation - DC00022421

Continue >>

EXPERT WITNESS

7. * Have you been an expert witness or medical legal consultant (not contracted through WFBH or its affiliates) for the previous calendar year (January-December)? O Yes
No Clear

Blue Help Buttons

system. Click the button once to open the purple help box, and click it again to close the box.

Blue help buttons are scattered throughout the

FAMILY OR CONSENSUAL RELATIONSHIPS

6. * Is there a family member or individual(s) with whom you have a consensual relationship employed at WFBH or one of its affiliates?

Family member	Spouse, domestic partner, child, grandchild, grandparent, parent, brother, sister, those in a 'step', 'half' or 'in-law' relationship, aunt, uncle, niece, nephew, or first cousin.
Consensual Relationship	A dating, sexual, or cohabitating relationship.

Remember

All questions regarding income on the annual disclosure pertain to the previous calendar year (January-December).

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2018

Definitions appear when your cursor hovers over underlined words

Annual Certification for Marvin Fernfeather : What to Disclose

The following question relates to any <u>entities</u> with which you (or a <u>family member</u>) own equity or intellectual property rights, had fiduciary relationships or received income or trappers of value in the previous caler year (January-December).

Only report a family member's outside relationship if you know that the entity does business with WFBH.





What to Disclose





Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu

You Are Here: 🛱 Annual Disclosure Certificatio...

<< Back

Save | Exit | Hide/Show Errors | Print... | Jump To: What to Disclose -

Continue >>

sure Certification - DC0002242

Annual Certification for Marvin Fernfeather : What to Disclose

The following question relates to any <u>entities</u> with which you (or a <u>family member</u>) own equity or intellectual property rights, had fiduciary relationships or received income or transfers of value in the previous calendar year (January-December).

Only report a family member's outside relationship if you know that the entity does business with WFBH.

- Income Disclose any income or honoraria earned in the previous calendar year from providing <u>labor or services</u> to an outside <u>entity</u> (including speaking, consulting, editorials, serving on paid boards, etc.) <u>Do not report</u> writing, membership on peer review panels, visiting professorships or lectureships at academic medical centers, federal and non-federal study section membership, grant review panels, or textbook editorships.
- Equity holdings or ownership Disclose entities founded or owned. Disclose any shares of equity owned, including stock options, warrants or promises of such, etc., whether the company is privately or publicly held and even if there is no current value. This includes equity in start-up companies. Do not report stocks or other investments in which you have no day to day control.
- Intellectual Property Rights/License Agreements- Disclose intellectual property, license agreements and/or royalties received, including those paid to you by WFBH.
- Fiduciary responsibility Disclose fiduciary responsibilities in the previous calendar year with any outside entities (for-profit and not-for-profit), including but not limited to board memberships, company officer role or executive management role, whether paid or unpaid. This includes scientific advisory boards.
- Unrestricted Gifts Disclose any unrestricted gift received in the previous calendar year for research or educational support, including equipment, supplies, etc.
- Fellowship or scholarship Disclose any fellowship (ACGME or Non-ACGME) or scholarship sponsored by a healthcare product or service company, professional organization or a medical school department.

* Are there any entities with which you have an outside relationship or a <u>family member</u> has a financial or fiduciary relationship, as defined above?



VV Wake Forest®	eCOI	Edit: Disclosure Ce	ertification - DC00022421
Baptist Health	Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu		
Are Here: ௴ Annual Disclosure Certific	atio		
- Dack	Save Exit Hide/Show Errors Print Jump To: Assurance and Certification *		Finish
 I hereby acknowledge that I have read I affirm that the information provided i I will provide any additional information 	and understand the WFBMC Conflict of Commitment and Conflict of Interest Policy s to the best of my knowledge true and complete and does not misstate any facts. n as requested by the Conflict of Interest Office.		
 I agree to cooperate in the development agree to comply with the terms and co 	nt of any needed <i>Management Plan</i> as required per the Federal Regulations to manage, reduce, or eli nditions contained in any <i>Management Plan</i> .	minate existing conflicts of interest	related to my research. I
I agree to cooperate in the development agree to comply with the terms and co Check Yes to confirm that you understate Yes O No <u>Clear</u>	nt of any needed <i>Management Plan</i> as required per the Federal Regulations to manage, reduce, or eli nditions contained in any <i>Management Plan</i> . Ind and agree with the above statements, and all your disclosures are up-to-date. After ch	minate existing conflicts of interest oosing yes, click " <u>Finish</u> " to subr	related to my research. I mit your disclosure.
I agree to cooperate in the development agree to comply with the terms and co Check Yes to confirm that you understate Yes O No <u>Clear</u> cer reading the bullet point	nt of any needed <i>Management Plan</i> as required per the Federal Regulations to manage, reduce, or eli nditions contained in any <i>Management Plan</i> . and and agree with the above statements, and all your disclosures are up-to-date. After ch	oosing yes, click " <u>Finish</u> " to subr elect "Finish" at the to bottom of the page t	related to my research. I mit your disclosure.

Entity Details



You Are Here: 🖓 Annual Disclosi

<< Back

<u>If</u> you indicated that you have relationships with outside entities to report, then the "Entity Details" page will automatically appear so that you can provide details .



Remove

IMPORTANT: Entities reported on last year's annual disclosure are informational only and DO NOT carry over. You must re-enter all current

relationships for this annual disclosure period.

Value (family)

Last Updated

Annual Certification for Marvin Fernfeather : Entity Details

Reminder Only - Entities Reported on Last Year's Annual Disclosure: Entity
Disclosure Type(s)
Baxter Healthcare
Consulting, advisory boards, or speaking activities

How to Add Entities for this Annual Disclosure:

Click the "Add Entity" button to report a relationship for this annual disclosure.

S Add Entity

Click the "Add Entity" button to report a relationship for this annual disclosure period

DID YOU REMEMBER ALL ENTITIES FOR THIS ANNUAL DISCLOSURE?

Value (self)

ew this list for accuracy before you continue. The Edit button on the left column allows you to revise details.

Disc Types (Family)

View/Edit Entities Relationships Disc Types (Self) There are no items to display

<< Ba	ack						Save	Exit	Hide	e/Sho	w En	rors	Print.	Ji	ump To	: En	ntity De	etails 🔻						Contin	nue >>	,

New Entity Details

Enter the first three letters of the new entity name . A dropdown menu will automatically appear. Choose the correct entity and click "OK." <u>Do not</u> use the "Select" button.

🕘 Execute "New Entity Details" on DC00021953 - Internet Expl🤈

New Entity Details

Select the outside entity with which you have a relationship:

If outside entity does not appear in list above, please contact coidisclosures@wakehealth.edu

If your entity is not listed, use the email link to request the addition of the entity.

OK Cancel

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Entity Information



Disclosure for Marvin Fernfeather : Entity Information Baxter Healthcare

1. * Which individual has a relationship with this entity?

Self Family Member

Spouse, domestic partner, child, grandchild, grandparent, parent, brother, sister, those in a 'step', 'half' or 'in-law' relationship, aunt, uncle, niece, nephew, or first cousin

<< Back

If you select both self and family member, you will be directed to answer questions about your own outside relationships FIRST.

Continue >>

Self Entity Relationships

VV Wake Forest	1000	Edit: Disclosure - FI00002174
Baptist Health	Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu	
You Are Here: 🗳 Annual Disclosure Certifi	catio 🗉 🚰 Disclosure FI00002174 for Marv	
<< Back	Save Exit Hide/Show Errors Print Jump To: - Self Cover Page -	Continue >>
Disclosure for Marvin Fernfeat Baxter Healthcare Welcome to the Self portion of	her : Self Entity Relationships	
You have indicated a relationship with this e	ntity. The following pages will ask for additional information related to your interest.	
1. * Did you engage in research that	is sponsored or supported by this entity during the previous calendar year (Jan-Dec)?	
2. * Did you engage in travel during ○ Yes ○ No <u>Clear</u>	the previous calendar year (January-December) that was directly paid or reimbursed by this enti	ity?
3. * Do you engage in or provide invo	astment advice to this entity?	

- 4. * What type of interest do you have with the outside entity?
 - Owner, founder, equity (shares / stocks)
 - Consulting, advisory boards, or speaking activities
 - Paid Editorial activities
 - Board of directors, company officer, or executive management
 - Employee
 - Intellectual Property Rights (license / royalties)
 - Unrestricted Gifts
 - Fellowship

Based on your answers on this page, you will be directed to answer more questions about the outside relationships you selected. These detailed pages are self explanatory and are not displayed in these instructions.

5. <u>* How many days did you work at the entity during the previous calendar year (Jan-Dec).</u>

6. * Provide your best estimate of the number of days you will work at this entity during the current calendar year (Jan-Dec).

Family M	ember Entity	Information	
Wake Forest ® Baptist Health	ecoi Conflict of Interest Office: (336) 716-9300 / coloffice@wakehealth.edu	Edit: Disclosure - F	100002174
You Are Here: 🗳 Annual Disclosure Certific	atio > 🚰 Disclosure FI00002174 for Marv		
<< Back	Save Exit Hide/Show Errors Print Jump To:	- General Information Family -	Continue >>
Disclosure for Marvin Fernfeat Baxter Healthcare	ner : Family Member Entity Information	This page shows if you selected family member.	
1. * What type of interest does your f	amily member have with the outside entity?		
Owner, founder, equity (shares /	stocks)		
Board of directors, company office	er, or executive management		
Employee			
Intellectual Property Rights (license)	se / royalties)	Remember: Only report a family me	ember's
Other		outside relationship if you know th entity does business with WFBH o entity is involved in your resear	hat the or the rch.
<< Back	Save Exit Hide/Show Errors Print Jump To:	- General Information Family -	Continue >>

Disclosure Summary

VV Wake Baptis	e Forest st Health Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu	Edit: C)isclosure - FI00002174
You Are Here: 🗳 Annua	al Disclosure Certificatio > 🗳 Disclosure F100002174 for Marv		
<< Back	Save Exit Hide/Show Errors Print Jump To: - Disclosure Summary +		Finish
Disclosure for M	arvin Fernfeather in Baxter Healthcare: Disclosure Summary		
	Compensation Type	Dollar Value	
	Owner, founder, equity (shares)		
	Consulting, advisory boards and speaking	\$5,000.00	
	Editorial		
	Intellectual property rights		
	Board of directors, company officer, executive mgmt.		
	Employee		
	Unrestricted Gifts		
	Fellowship		
	Total Value	\$5,000.00	
	Total Days Previous Year	5	
	Total Days Current Year	5	

Review the disclosure summary for the outside relationship you have reported with each entity. Then click "Finish" at the top or bottom right.

Entity Details



DID YOU REMEMBER ALL ENTITIES FOR THIS ANNUAL DISCLOSURE?

Review this list for accuracy before you continue. The Edit button on the left column allows you to revise details.

View/Edit	Entities	Relationships	Disc Types (Self)	Value (self)	Disc Types (Family)	Value (family)	Last Updated	Remove
Edit	Baxter Healthcare	Self	Consulting, advisory boards, or speaking activities	\$5,000.00	none specified		4/2/2019 10:56 AM	\mathbf{X}



Hide/Show Errors Edit: Disclosure Certification - DC00022421 Wake Forest Baptist Health Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu You Are Here: 🖓 Annual Disclosure Certificatio... << Back Save | Exit | Hide/Show Errors | Print... | Jump To: Check for Errors -Continue >> Annual Certification for Marvin Fernfeather Click the "Hide/Show Errors" link above to review your disclosure and verify all required content has been completed • A window will appear below to display any missing information and a link (Jump To) to the page where it can be found The refresh button may be used to update the error list If no errors are detected you can continue to the final page and submit your Annual Disclosure << Back Save | Exit | Hide/Show Errors | Print... | Jump To: Check for Errors -Continue >>

nce and Certification	
Conflict of Interest Officer (See	Edit: Disclosure Certification - DC00022421
catio	
Save Exit Hide/Show Errors Print Jump To: Assurance and Certification 🔻	Finish
Fernfeather : Assurance and Certification I and understand the WFBMC Conflict of Commitment and Conflict of Interest Policy is to the best of my knowledge true and complete and does not misstate any facts. In as requested by the Conflict of Interest Office.	
nt of any needed <i>Management Plan</i> as required per the Federal Regulations to manage, reduce, or eli Inditions contained in any <i>Management Plan</i> .	minate existing conflicts of interest related to my research. I
points box to Save Exit Hide/Show Errors Print Jump To: Assurance and Certification •	oosing yes, click " <u>Finish</u> " to submit your disclosure. Click "Finish" to submit your disclosure.
	Acce and Certification functions of the end of the addition of a missing entity, save your work but do Not proceed with this page. The left of Interest Oncourse to the left of Interest Oncourse and understand the WFBMC conflict of Commitment and Conflict of Interest Policy as requested by the Conflict of Interest Office. In dand agree with the above statements, and all your disclosures are up-to-date. After of and and agree with the above statements, and all your disclosures are up-to-date. After of points to the base of may management Plan as required per the Federal Regulations to manage, reduce, or ell and and agree with the above statements, and all your disclosures are up-to-date. After or points to the left Hide/Show Errors Pint., Jung Tr. Surgrace and Certification

Disclosure Completion

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Home Reports					
COI > Annual Disclosure Cer	tification for Marvin Fernfeather 20	19			
Actions	Status: Supervisor Review	Type: Annual Certificatior	Note that you have successfully completed	Discloser: Marvin Fernfeather Phone:	
View Disclosures			your annual COI		
Printer Version			disclosure!		
	Summary History D	Disclosure Reviews			
/ Log Comment	Notes to Discloser				
Disclosure Certifications - In Process	Congratulations! You have successfully submitted your COI certification. Your disclosures are currently under review. Please check your email account, listed in the system as bmaynard@wakehealth.edu, for any communication regarding the status of review. If further action is required, you will be notified at the above listed email address, and will have to log back into this system.				
	Summary				
	Snapshot: Date Submitted: 4/2/2019				
	Routing Information				
	Discloser has a Significant Finan	cial Interest: Yes			
	Discloser involved in Research:	Yes			
	Discloser has Institutional Respo	nsibilities: Yes			
	Necus Review.	165			

Contact Information

- <u>http://intranet.wakehealth.edu/Departments/COI/</u>
- coioffice@wakehealth.edu
- (336)716-9300

