

# Supervisor Role in eCOI

How to Navigate the System

# Annual Disclosure

As a designated department supervisor, you are responsible for reviewing and signing off on your employee(s) annual disclosure(s) that reveal an outside interest. This process must be completed before the COI office can review the annual disclosure(s). You are also responsible for reviewing the names of those individuals who had no outside interest to report.

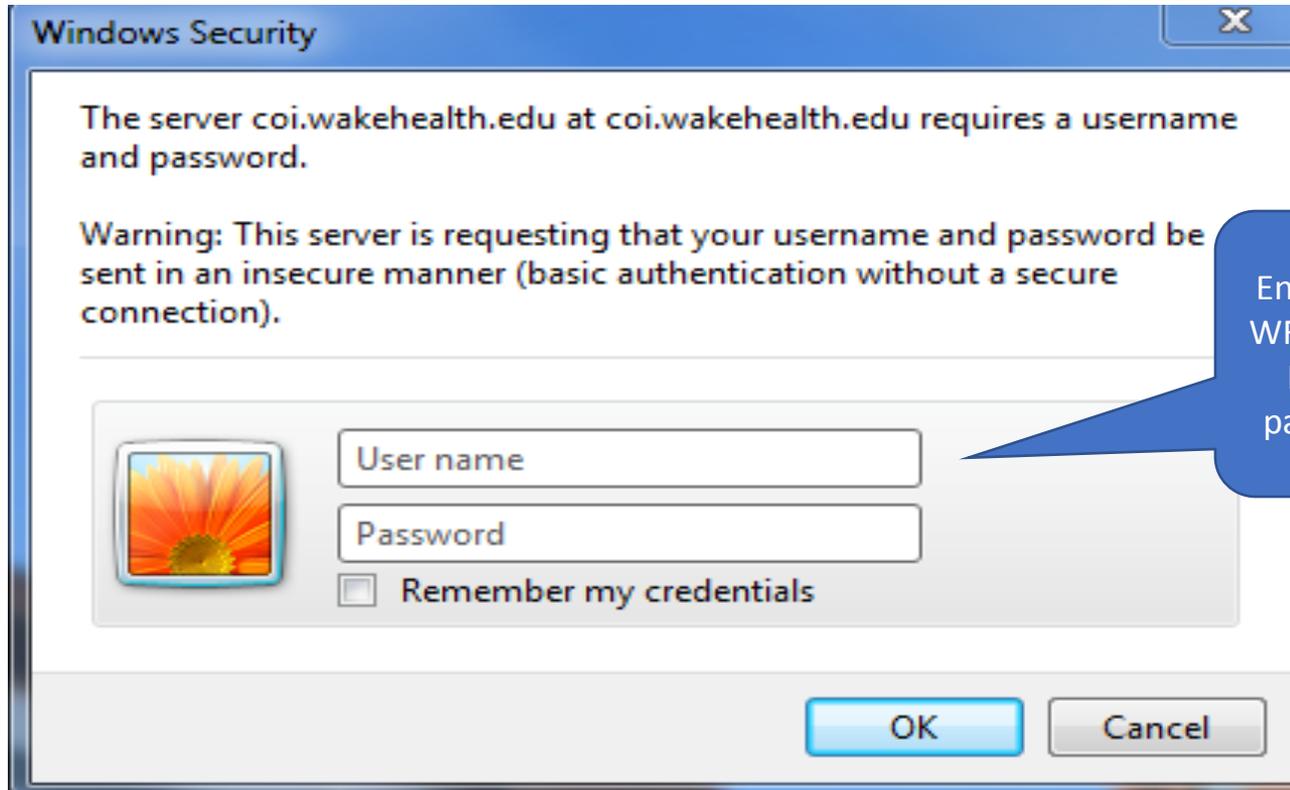


# Log into the COI System

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



# Log into the COI System



# Accessing your Inbox

The screenshot displays the eCOI system interface. At the top left is the Wake Forest Baptist Health logo. To its right is the eCOI logo and the text "Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu". In the top right corner, there is a user menu with "James Moore", "My Inbox", and "Logoff" options. A blue callout box points to the "My Inbox" link with the text "Go to your Inbox by clicking here". Below the header is a navigation bar with "Home" and "Reports" tabs. A "Pages" sidebar on the left contains "Contact Us" and "eCOI User Guides". The main content area is titled "Welcome to the eCOI (Electronic Conflict of Interest System)" and lists actions: "Complete an Annual Disclosure" (with sub-points about April disclosures and clinical providers) and "Request Approval for Outside Activities" (with sub-points about employment, industry-funded events, and routing). A "Login" box on the right shows "James Moore", "My Home", and a "Log Off" button. A red text instruction at the bottom states: "To get started, click My Inbox at the top right of your screen".

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eCOI  
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James Moore | My Inbox | Logoff

Home Reports

Home

Pages

- Contact Us
- eCOI User Guides

### Welcome to the eCOI (Electronic Conflict of Interest System)

Here you can:

- Complete an Annual Disclosure**
  - Annual Disclosures are generated in April and upon new hire for exempt and special exempt employees and for all clinical providers.
- Request Approval for Outside Activities**
  - You may request approval for Outside Employment opportunities.
  - You may request prior approval for Non-Certified Educational Activities that are funded by industry. (Includes attending, organizing, or speaking at an industry funded educational event).
  - The system will electronically route your outside activity request to the appropriate individual for required approval.

Login

James Moore  
My Home  
Log Off

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

# Choose your Role

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James Moore | My Inbox | Logoff

Home  
Page

Select "Annual Disclosure Inbox" under "My Roles"

**My Roles**  
[Annual Disclosure Inbox](#)  
[Outside Activities Inbox](#)

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

**Resources**  
[Conflict of Interest Policy](#)  
[Conflict of Commitment Policy](#)

**My Inbox** | My Report To Status

Complete any items found below. Once complete it will remove the item from your inbox.

Filter by

Name	Date Created	State	Date Submitted	Supervisor
Annual Disclosure Certification for Marvin Fernfeather 2019	3/26/2019 2:34 PM	Supervisor Review	4/2/2019	James Moore

1 items      page 1 of 1      10 / page

# Supervisor Review

## My Roles

[Annual Disclosure Inbox](#)

[Outside Activities Inbox](#)

## Page for James Moore

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

### Resources

[Conflict of Interest Policy](#)

[Conflict of Commitment Policy](#)

### My Inbox

My Report T

Complete any items found below

Select the Annual Disclosure you want to review

Filter by

Name

Advanced

Name	Date Created	State	Date Submitted	Supervisor
Annual Disclosure Certification for Marvin Fernfeather 2019	3/26/2019 2:34 PM	Supervisor Review	4/2/2019	James Moore

1 items      < page 1 of 1 >      10 / page

# Detailed Summary



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

James Moore | My Inbox | Logoff

Home Reports

COI > Annual Disclosure Certification for Marvin Fernfeather 2019

Status: **Supervisor Review**

Discloser: **Marvin Fernfeather** | Phone:

**Actions**

- View Disclosures
- Printer Version
- ✓ Complete Supervisor Review
- ← Send Supervisor Concerns
- Log Comment

Disclosure Certifications - In Process

Select the "Disclosure Reviews" Tab for a detailed summary

**Summary** | History | Disclosure Reviews

**Notes to Discloser**

**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:** 4/5/2019

**Routing Information**

Discloser has a Significant Financial Interest:	Yes
Discloser involved in Research:	Yes
Discloser has Institutional Responsibilities:	Yes
<b>Needs Review:</b>	Yes

# Points to Consider During your Review:

- Time spent on outside activities:
  - Is it reasonable?
  - Is it within the department's allowable number of days outside the office?
- Relationships with outside entities (e.g. employee, consulting, speaking, etc.):
  - Was prior approval obtained?
  - Could the relationship affect decisions made while performing institutional responsibilities? (e.g. research, purchasing, clinical decisions, etc.)



# Complete the Supervisor Review

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James Moore | My Inbox | Logoff

Home Reports

COI > Annual Disclosure Certification for Marvin Fernfeather 2019

Actions

- View Disclosures
- Printer Version
- Complete Supervisor Review
- Send Supervisor Concerns
- Log Comment

Status: **Supervisor Review** Type: Annual Certification | ID# DC00022421 Discloser: **Marvin Fernfeather** | Phone:

Summary History Disclosure Reviews

Notes to Discloser

**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 the current 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 the system.

Summary

Snapshot:  
Date Submitted: 4/2/2019

Routing Information

Discloser has a Significant Financial Interest: Yes  
Discloser involved in Research: Yes  
Discloser has Institutional Responsibilities: Yes  
Needs Review: Yes

Disclosure Certifications - In Process

Use the scroll bar to view all disclosed entities if needed

Once you have reviewed the disclosure and have no questions or concerns, click the "Complete Supervisor Review" button to move the disclosure out of your "Inbox"

# Reports

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

James Moore | My Inbox | Logoff

Home Reports

Page for James Moore

**My Roles**  
Annual Disclosure Inbox  
Outside Activities Inbox

**Resources**  
Conflict of Interest Policy  
Conflict of Commitment Policy

**My Inbox** My Report To Status

Complete any items found below. Once complete it will remove the item from your inbox.

Filter by  Name

Name	Date Created	State	Date Submitted	Supervisor
Annual Disclosure Certification for Marvin Fernfeather 2019	3/26/2019 2:34 PM	Supervisor Review	4/2/2019	James Moore

1 items  / page  / page

You can view the Annual Disclosure status for all employees who directly report to you. To view the list, select "Reports"

(Activity) on the left side of the page to navigate eCOI.

# Reports

## Reports

### Forms and Templates

[CMP Template 8.17.17.doc](#)

[InterimReporttemplate2.17.17.doc](#)

### Standard Reports

#### Certification Reports

▾ Name

[Annual Disclosures of My Direct Reports](#)

#### Discloser Reports

Name

There are no items to display

#### Disclosure Reports

Name

There are no items to display

#### My Disclosures

▾ Name

[My Annual Disclosures](#)

Select "Annual Disclosures of My Direct Reports"

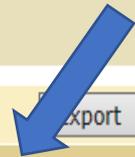
# Reports

Annual Disclosures of My Direct Reports Help

Filter by

Link to Disclosure	Discloser	Dept ID	Dept	Project State	Date Entered State	
<a href="#">Annual Disclosure Certification for Marvin Fernfeather 2019</a>	Marvin Fernfeather	11727	Wake Forest University Health Sciences	Administrative Review	4/5/2019 9:10 AM	
<a href="#">Annual Disclosure Certification for Peter Parker 2019</a>	Peter Parker	11727	Wake Forest University Health Sciences	No Review Required	4/3/2019 2:41 PM	
<a href="#">Annual Disclosure Certification for Clark Kent 2019</a>	Clark Kent	11727	Wake Forest University Health Sciences	No Review Required	4/2/2019 1:39 PM	

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Supervisors should evaluate this report for accuracy. Those Annual Disclosures with a project state of “No Review Required” reported no outside interests. If you believe an outside interest should have been reported, please contact the individual to reconcile.

# Reminder

- You will receive a monthly email if you have any new or revised disclosures which require your review
- Only those disclosures that report an outside interest will require a detailed review



# Contact Information

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

