Using a web browser, navigate to the COI Disclosure Form.
https://radapps.duke.edu/coi_form

Login:
Enter your NetID and password to log in to the system.
The COI Form Application uses the Shibboleth Single Sign on system.
The COI Annual Disclosure Welcome page displays your current disclosure status and identifies your next step in the disclosure process. Follow the instructions on the screen to start entering your disclosure.
The Navigation Menu:
The Navigation Menu serves as a point of reference during the disclosure process. It tracks the status of each section of the disclosure form. Once you have completed all sections of the form, you will be prompted to submit your form.
The Navigation Menu cont’d:
There are two ways to navigate to the various sections of the wizard.
- Click the section names on the Navigation Menu
- Click the Continue and Back buttons as they are made available

Links to Logout and the Need Assistance webpage are available in the top right corner of the page.

Notice: If you submitted a form last year, you will see a link to that form in the bottom right hand corner of the screen. Just click on the link to view last year’s submitted form.
**Demographics:**
On the Demographics page, certain fields will already be pre-populated. You will be required to fill in the remaining fields before submitting.

**Notice:** The Print Preview link, at the top of the page, allows you to look at your form in a printable format. Also notice that fields shaded in **RED** are required. You will not be able to submit your form without completing required fields.
Assessment:

The Assessment page displays a series of questions that must be answered. Your answers to assessment questions will determine the rest of the sections and questions you will receive. Upon completion of the Assessment section, the Continue button will direct you to your next required section.

Notice: Some questions have fields that warrant a description. These are also required fields and you cannot proceed without completing these fields.
**Relationships:**

Based on your previous responses, you will be asked questions to determine if you have a relationship with an entity that is of concern to Duke.

**Notice:** If you had relationships with entities last year, and the answers on your form show that you may have a relationship this year, the COI Forms application will pre-populate your COI form with the names of the entities that you listed last year.
Entities:

The Entity page allows you to enter details about your relationship with a specific entity. Special Instructions are provided to help you answer the questions. A standard list of entities is provided for you. You should select an entity from the standard list whenever possible. Once you find your entity in the entity search box, continue to answer questions about that entity.

If you do not see your entity in the list, type the full name and enter the profit or not-for-profit status followed by the public/non-public information.
To delete an entity, use the trashcan icon located in the navigation menu beside the entity name. A button to delete entities is also located at the bottom of the entity page.

*Notice:* Customers can navigate between their companies by clicking on the name in the sub-navigation menu.
Entities cont’d:

After adding an entity and answering questions about your relationship, you will be asked if you need to add another entity. To add additional entities you can either click the ‘Add’ link in the navigation menu, or the application will ask you if you need to add another entity before continuing on to the next section.

Other Matters:
The Other Matters page displays additional questions that must be answered. Once you complete this page, the Continue button will take you to the Submit section.

Submit Form:
For each completed section, you will see green checkmarks signifying that all sections of the form are complete.
Submit Form cont’d:

Next you will receive verification questions to ensure that you are finished disclosing information. After completing all questions, a button to submit your form will appear. Click this button to submit your COI form.

Once you click submit, you will see a popup window. Click “OK” to attest that all the information you entered is true. Then you will get a status page reporting that the form has been submitted.
Submit Form cont’d

At this point, your form has been submitted.

Returning to the starting page by clicking the provided link will route you back to the page that shows your submission status and your recent form activity. From this screen, you can log out, view your submission, or make changes to your form if needed.