Research Management System - Conflict of Interest
Accessing the COI Module as a Delegate
Quick Guide
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Entering or Editing a Financial Disclosure


B. On the left-hand side of the Home tab, hover over Conflict of Interest and select Create/Update Disclosure.

C. Your profile is selected by default. In the drop-down menu, select the name of the person for whom you are entering Financial Disclosure information.
   • The refresh button refreshes the list of individuals who have given you access to edit their disclosures.

D. Click the red Enter/Update button next to Financial Disclosure Statement.
Note: When the Financial Disclosure Statement (FDS) opens, you will see a yellow alert banner that says “You are accessing this disclosure as a delegate, do NOT submit.”

E. Confirm the name in the top left corner matches the person for whom you are entering FDS information.

F. Follow the COI Disclosure Entry Quick Guide for steps on how to enter or edit information in the FDS. A link to this quick guide is also found in the top right corner of the FDS page.

G. Once you have completed editing or entering the information, save and exit the FDS.

Do not submit. Delegates are not permitted to submit Financial Disclosure Statements; only the individual named on the FDS can submit.

**Entering or Editing a Research Disclosure Form**

A. Log in to the Research Management System at [https://rms.wustl.edu](https://rms.wustl.edu). Log in with your WUSTL key.

B. On the left-hand side of the Home tab, hover over Conflict of Interest and select Create/Update Disclosure.
C. Your profile is selected by default. In the drop-down menu, select the name of the person for whom you are entering information.
   • The refresh button refreshes the list of individuals who have given you access to edit their disclosures.

D. Click the red **Enter/Update** button next to Research Disclosure.

![Image of Create/Update Disclosure]

On the “Other Research Activities” page of the Research Disclosure Form (RDF), you will see a yellow alert banner that says “You are accessing this disclosure as a delegate, do NOT submit.”

E. Confirm the name in the top left corner matches the person for whom you are entering RDF information.

![Image of Research Disclosure Form]

F. Follow the Research Disclosure Entry Quick Guide for steps on how to enter or edit information in the RDF. A link to this quick guide is also found in the top right corner of the RDF page.

G. Once you have completed editing or entering the information, save and exit the RDF.

**Do not submit.** Delegates are not permitted to submit Research Disclosure Forms; only the individual named on the RDF can submit.
Entering or Editing a Travel Disclosure

A. Login to the Research Management System at https://rms.wustl.edu. Log in with your WUSTL key.

B. On the left-hand side of the Home tab, hover over Conflict of Interest and then select Create/Update Disclosure.

C. In the drop-down menu, select the name of the person for whom you are entering travel information.

D. Click the red Enter/Update button next to Travel Disclosure.

Note: You will not see the name of the individual for whom you are entering travel information, so it is vital that you selected the correct person from the drop down menu in the previous step.

E. Follow the Travel Disclosure Entry Quick Guide for steps on entering or editing travel information. A link to this quick guide is also found in the top right corner of the travel disclosure page.

F. If authorized by your delegator, submit the travel disclosure.
Viewing Who has Granted you Delegate Access

A. Log in to the Research Management System at [https://rms.wustl.edu](https://rms.wustl.edu). Log in with your WUSTL key.

B. Select **My Profile** from the top-level menu.

C. In the left-hand box, select **Delegates**. The screen will display those who have made you a delegate and your delegates (if any).

Viewing your Delegator’s Messages (only if granted access)

Select **Messages** from the top-level menu. To view your delegator’s messages, select his or her name from the drop-down menu. If you do not see a drop-down menu, you have not been given access to your delegator’s messages.

Note: Deleting messages in RMS does not remove them from external email clients (e.g. Outlook).
Viewing your Delegator’s Things to Do (only if granted access)

Select **Things to Do** from the top-level menu. To view your delegator’s messages, select his or her name from the drop-down menu. If you do not see a drop-down menu, you have not been given access to your delegator’s Things to Do.

![Things to do](image)

Additional Support

COI Website: [https://coi.wustl.edu](https://coi.wustl.edu)

COI Policy Support: Ask COI: (314) 747-4181

Technical Support: Service Desk: (314) 935-5707

The current internet browser requirements to run this software can be found at [https://coi.wustl.edu/faq](https://coi.wustl.edu/faq).