How to Search for Financial Interest Disclosure Cases for Selected Individuals or Individuals Listed in Specific Departments within UConn Health InfoEd

This help document is related to the Financial Interests [FCOI] module in the UConn Health InfoEd Electronic Research Administration (eRA) portal. It describes how Department Administrators (e.g. business managers, administrative and fiscal managers, program assistants) and Research Administrators (Office of the VP for Research and/or Clinical COI Committee staff) with additional requested security permissions can search the Financial Interests [FCOI] module to determine the financial disclosure status and last certified date for individuals at UConn Health to facilitate grant submissions and/or to monitor departmental compliance with the UConn Health policy. If your role requires this access and you do not have access (please try it first; if you can search and return results for records other than yourself, then you have access already), please complete and return the eRA Account Access Request form to request Department Administrator security access to the Financial Interests module at UConn Health. These instructions only apply to UConn Health personnel and should not be used by persons on the UConn Storrs or regional campuses.

1. **Log in** to the UConn Health InfoEd portal at [https://uchealth.infoed.uconn.edu](https://uchealth.infoed.uconn.edu) using your UConn NetID (e.g. abc12345) and password. For NetID assistance, see [https://netid.uconn.edu](https://netid.uconn.edu).

2. After logging in, click **Financial Interests [FCOI]** in the left hand navigation area.

3. Click **Search** and a search box with multiple fields is displayed on screen providing you with the ability to search by Investigator (e.g. a person who may need to disclose under UConn Health policy), Department and/or other criteria. Choosing one or more criteria will return results where all that criteria are present.

   ![Example results displaying a list of disclosure cases for all persons listed in a particular department.](image-url)
4. **Enter your search criteria.**
   a. **To search for an individual:**
      i. At the end of the Investigator field in the search form, click Set
      ii. Using the alpha picklist, go to the first letter of the person’s last name and click on that letter
      iii. Type the first few letters of the person’s name in the “Search for a particular entry” box to filter the drop down menu displayed
      iv. Choose the person’s name from the drop down menu (the absence of a person’s name signifies a disclosure is NOT required at this time and/or no COI disclosure case exists for the person)
      v. Click the save button. The criteria is added to the search form.
   b. **To search for all persons in an entire department:**
      i. At the end of the Department field, click Set
      ii. Using the alpha picklist, go the first letter of the department’s name and click on that letter
      iii. Choose the Department’s name from the drop down menu. *Note: You may also filter through the list of departments by entering the first few letters of the department in the “Search for a particular entry” box.*
      iv. Click the save button. The criteria is added to the search form.

5. Click **Locate** button in the upper right of the search box.

6. **Results** are displayed on screen below the search box. Up to 25 results are displayed on screen at a time. Use the Numbers 1 2 3 etc. hyperlink to navigate to additional results pages.

7. **Review the Last Certified Date** to determine if the individual disclosed during the past 365 days. A Case Status of “Created; No disclosure” and no last certified date signifies a person HAS NOT yet disclosed in the system.
   Depending upon your individual security, clicking on **Open** icon and the **View** icon while hovering over a case number may also display additional details and tabs/folders about that case. *Note: Not all persons at UConn Health are subject to the Individual, Clinical, and/or Institutional conflict of interest policies so they may not be in the system with a disclosure case, however if a person discloses, a case will be automatically be created for them.*