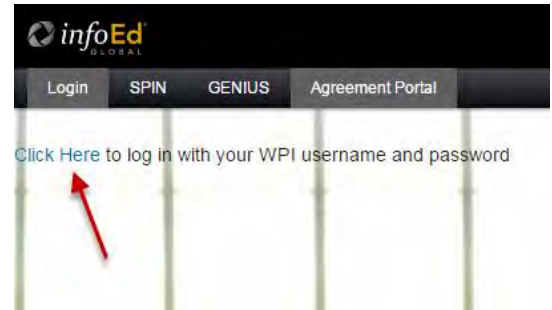




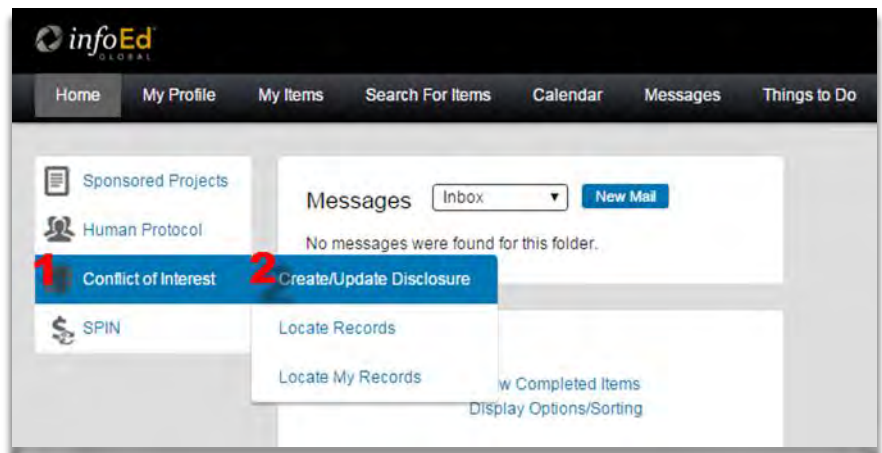
How to Create an Initial Financial Interest Disclosure in InfoEd

WPI's annual Conflict of Interest disclosure process has moved from Banner to InfoEd. This document will show you how to log in and make your initial disclosure. If you have grants (or are applying for grants), this disclosure will satisfy all sponsor requirements (NIH, NSF, etc.) for COI disclosures. You will no longer have to make a new disclosure with each proposal as long as your annual disclosure is up-to-date. Let's begin:

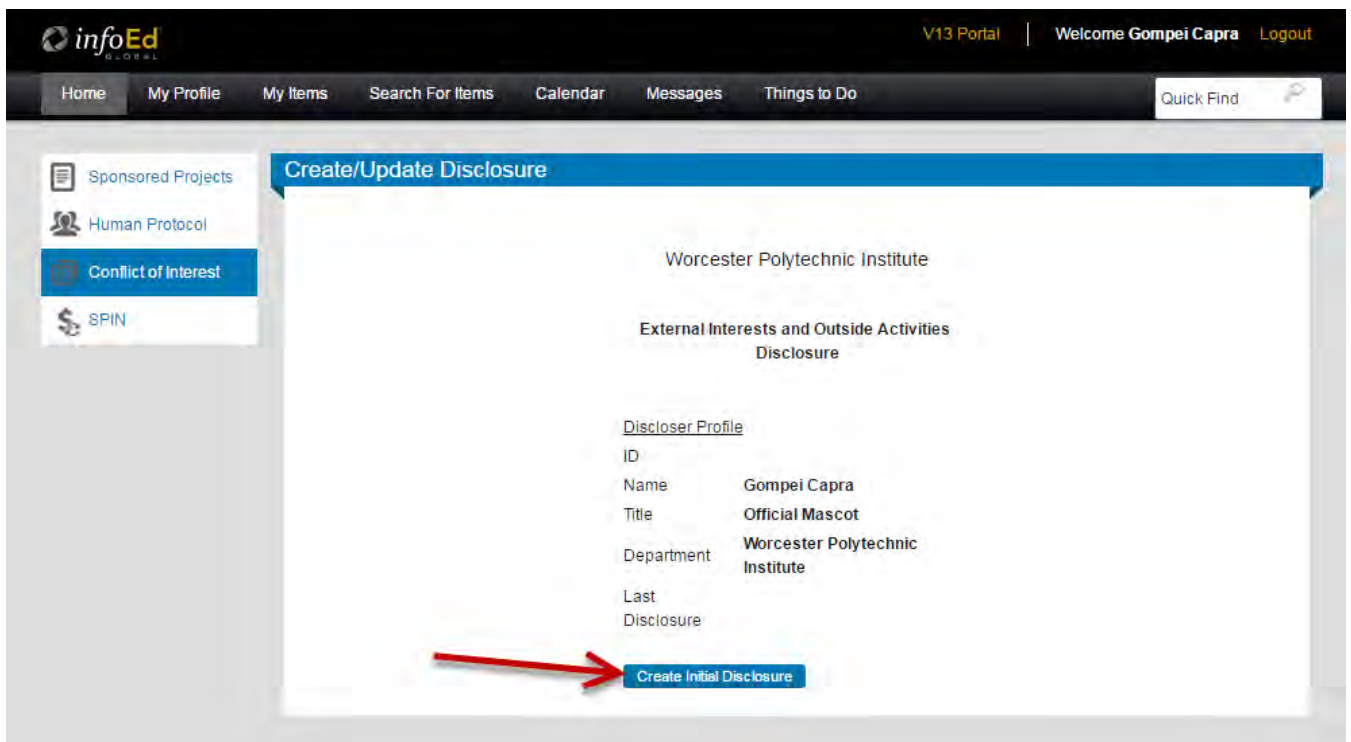
1. Go to the WPI InfoEd portal at <http://wpi.infoedglobal.com>. Click on the link to log in with your WPI username and password. When prompted, enter your username/password and click "LOGIN".



2. After logging in, hover your cursor over the "Conflict of Interest" link (1) in the menu on left hand side of screen. Then, click on "Create/Update Disclosure" (2) to navigate to the disclosure screen.



3. You should see a page that looks like the image below. Click on the "Create Initial Disclosure" button (shown below). This will bring up the disclosure form.

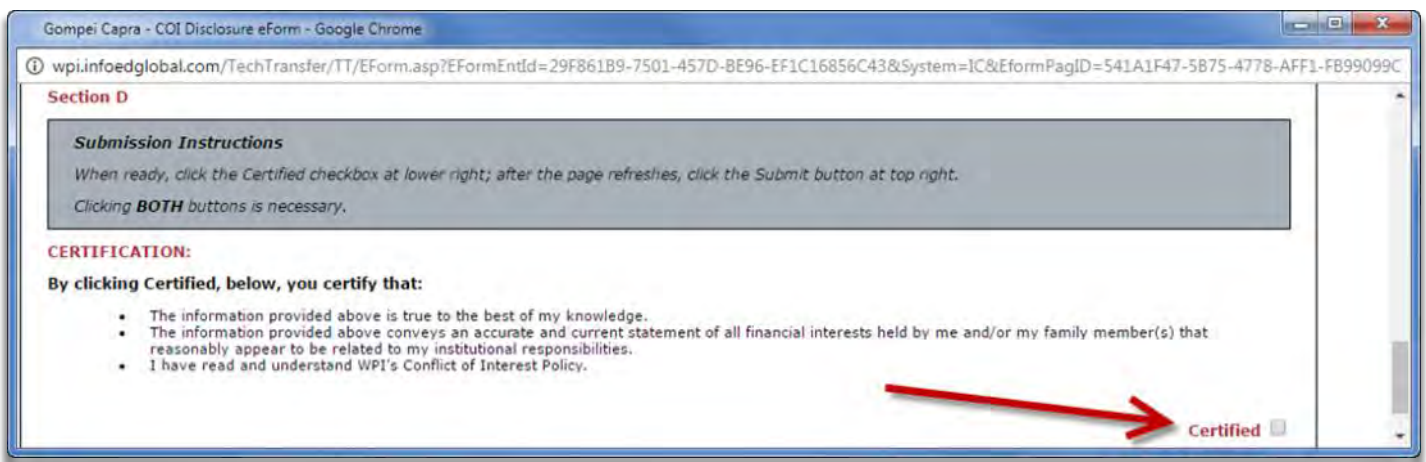


4. In Section A of the disclosure form, choose “Initial/Annual” from the dropdown menu.

5. Read the questions carefully and answer all of them completely. Words or phrases within the form that are blue and underlined will show definition text boxes when hovered over. Depending on your answers, you may be prompted to enter additional information.

If you have (or are applying for) grants, you will see additional questions pop up, which are required by the NSF and/or NIH. Just follow the instructions on the form. It is mandatory to respond to all questions on the form.

6. Once all questions have been completed, click the “Certified” box on the bottom right corner of the screen (shown below). When this box is checked, you cannot edit your answers. If you need to go back and make changes, just uncheck the box.



7. After you certify, the form will automatically save, which will take 5-10 seconds. If you answered “no” to question 5, some additional questions may appear. Just leave them blank, then scroll back up to the top of the page and click the “Submit” button. That’s it! You should see a confirmation message once the submission is received.

Please note: If you acquire any new financial interests that are related to your work at WPI (for example, you start a company, purchase stock, take on a consulting job, etc.) you need to come back and submit an updated disclosure within 30 days of acquiring that interest. The process for submitting an updated disclosure is the same, except that in step 4, you would choose “Addendum” from the dropdown menu.

Have questions? We’re here to help!

If you’re having any trouble using the system, we’d be happy to help walk you through it. Wondering if that stock / consulting job / side gig needs to be disclosed? We can help with that, too. Just reach out to any of the OSP contacts listed below and we’ll help you get it done!

Chelsea D’Urso, Research Compliance and Subaward Specialist, 508-831-6652, email: cedurso@wpi.edu

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