How to Complete the **A. Relationships** Section of the COI Disclosure Form

**QUICK SUMMARY**

1. Start at **A. Relationships**.

![Tree Diagram](image1)

2. Add, review, and/or remove relationships. To see detailed steps for completing the following actions, click on the links below:
   
   A. [ADD a New Relationship](#)
   
   B. [UPDATE a Previously Disclosed Relationship](#)
   
   C. [REMOVE a Previously Disclosed Relationship](#)

![Save Button](image2)

3. Once you have disclosed and/or updated ALL of your outside relationship(s), click the “Save” box (top, left corner of the screen).

![Completed Box](image3)

4. Check the “Completed” box (top, right corner of the screen).

5. Within the Navigation Pane (top, left corner of the screen) click on **4. Certification**.

![Certification Button](image4)

Questions? Email coi@ucdenver.edu. Call 303-724-7404 or 303-724-0034.
DETAILED STEPS

ADD a New Relationship

2.A.i. Click on the “ENTITY NAME” box (see below).

2.A.ii. Begin typing the name of the entity with which you have a relationship (see above).

2.A.iii. Either select the correct entity from the dropdown OR manually enter* the entity name (see above).

*NOTE: Unique values can be added. In other words, you can still add an entity name that isn’t in the dropdown.

2.A.iv. Once the correct entity's name is displayed in the field, click the “Add” button (see below).

CAUTION! Only click “Add” ONCE per entity.

2.A.v. The system will move you to the Relationship Details page that is devoted to the relationship you just added (see below).

(For further instructions on completing the A. Relationships page, return to the QUICK SUMMARY.)

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DETAILED STEPS

UPDATE a Previously Disclosed Relationship

2.B.i. Within the “Entity Name” table, click on the name of the relationship you wish to review.

2.B.ii. The system will move you to the **Relationship Details** page that is devoted to the relationship that you wish to review.

(For further instructions on completing the A. Relationships page, return to the QUICK SUMMARY.)
DETAILED STEPS

REMOVE a Previously Disclosed Relationship

2.C.i. From the “Entity Name” table, identify the relationship that you wish to delete (see above).

2.C.ii. Click on the trashcan icon that is to the right of the relationship that you want to delete (see above).

2.C.iii. Click “OK” in the dialog box that appears (see below).

2.C.iv. Allow the system to complete the action (see below).

2.C.v. Proceed as needed. For further instructions, return to the QUICK SUMMARY.

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