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Introduction

Policy requires that all faculty, staff, and network physicians seek prior approval from their appropriate Chair, Section Head, Director, VP, etc. for any outside activity funded by Industry Vendors. ECOI is a web-based, electronic system developed at Wake Forest Baptist Medical Center and customized to facilitate this process. Faculty, staff, and network physicians not only submit their annual disclosures via eCOI, but they can also use the system to request prior approval for:

- Outside employment opportunities (outside employment generally requires a personal consulting agreement from the Industry Vendor)
- Non-certified educational activities, such as:
 - o Attending an industry-funded educational event
 - o Organizing an industry-funded educational event
 - o Speaking at an industry-funded educational event
 - Travel to view capital equipment funded by industry

ECOI electronically routes Outside Activity requests to the appropriate individual(s) for approval and notifies individuals once the required approvals have been obtained.

*Please note that this electronic preapproval process is a policy compliance requirement. It does not replace any institutional requirements for travel and reimbursable expenses submitted via Concur.

Logging In

The eCOI website can be accessed by any computer with internet connectivity at: <u>http://coi.wakehealth.edu</u>

Enter your medical center ID and password in the pop-up box.

Windows Security	×
iexplore	
The server coi.wakehealth.edu is a password.	asking for your user name and
That server also reports: "coi.wak	ehealth.edu".
User name	
Password	
Remember my credentials	
ОК	Cancel

Once logged into the system, select "My Inbox" at the top left of your screen.

Wake Forest Baptist Health	Conflict of Interest Office: (336) 716-9300 / coloffice@wakehealth.edu	Hello, Marvin Fernfeather
» My Inbo Contact	eCOI User Guides	
	Welcome to the eCOI (Electronic Conflict of Interest System) Description Annual Disclosures annual Disclosures are generated in April and upon new hire for exempt and special exempt employees and all providers. It is due ASAP for review by leadership and the COI Office. Benerated Employment and Activities You may request approval for Votaide Employment opportunities and attach the contract or agreement. You may request approval for Non-Certified Educational Activities that are funded by industry. (Includes attending, organizing, or speaking at an industry funded educational event).	Login Marvin Fernfeather My Home Log Off

You must choose the appropriate role before you can access the outside activity forms. Select "Outside Activities Inbox" on the left side of the page.

V Wake Forest Baptist Health) / coioffice@wakehealth.edu			Hello, Marvin Fen
» My Inb	ox Home	Reports			
My Roles Annual Disclosure labor Outside Activities Inbox	Page for Marvin Fernfeather	se the correct role (Disclosure or	Outside Activity) on the	e left side of the page to navig	jate eCOI.
Resources	My Inbox My Report To Sta	tus			
Conflict of Commitment Policy Annual Disclosure Instructions	Complete any items found below. Once Filter by 😧 Name 💌 🗄	e complete it will remove the item Enter text to search for		Add Filter X Clear All State Date Submitte	d Supervisor
Supervisor Review Instructions	FCOI Training for Marvin Fernfeather 2 Annual Disclosure Certification for Mar		8/7/2019 12:41 PM 8/7/2019 11:40 AM	Open Draft	Teresa Anderson
	2 items	◀ page	1 of 1 >		10 / page

Select "Outside Activity Request" to initiate the electronic request process.

Wake Forest ® Baptist Health	eCOI STAGIN	KG 336) 716-9300 / coioffice@wakehealth.edu			Hello, Marvin Fernfeather -
» My Inbox	Home	Reports			
My Roles	-	in Fernfeather	er Outside Antisitu) on the l	-0 -1da of the many to music	to c(0)
Outside Activities Inbox	weicome to your P	ersonal Folder. Choose the correct role (Disclosure	or Outside Activity) on the I	en side of the page to haviga	ite ecol.
Create	My Inbox	Pending Dept Review or COI Review	My Outside Activities	Approver	
Outside Activity Request		ems found below. Once complete it will remove the it ID • Enter text to search for		• Add Filter 🗱 Clear All	
Resources	ID N	lame		Date Requestor Submitted	Dept Approver
Outside Activities User Guide		utside Employment Request Form requested by larvin Fernfeather Starting November 25, 2019	Fernfeather, Draft Marvin	Marvin Fernfeather	Clark Kent
Conflict of Interest Policy Conflict of Commitment Policy	re	ttending Industry-Funded Educational Event quested by Marvin Fernfeather Starting September 0, 2019	Fernfeather, Draft Marvin	Marvin Fernfeather	Teresa Anderson
	2 items	∢ page	1 of 1 ▶	(10 / page

Use the "Back" and "Continue" buttons to navigate through the electronic form. Click the "Save" button on the banner before navigating back or exiting the system prior to submission of the form. Otherwise, you could lose information you have already entered.

Wake Forest Baptist Health	Conflict of Interest Office: (336) 716-9300 / coi	office@wakehealth.edu	New: Out	arde Activity Forms
« Back		Save Print		Continue »
Julside activities that require prior approval	include, but are not limited to Industry-paid or s	ponsored consulting, speaking, expert testin	nony, paid court appearances, laboratory testing, teachin	g, etc.
 Outside activities that require approval also in organization, charitable foundation, or academic 		in organizations including board of director	s, officers, manager, or medical director of a for-profit cor	npany, non-profit
	pproval include writing, membership on peer revi at meetings paid by academic societies or non-p		eships at academic medical centers, federal and non-fede s.	eral study section
<u>*</u> 1. For what activity are you requesting prio	or approval? 🞯			
O Outside Employment				
O Industry-Funded Non-Certified Educationa	al Activity			
Clear				
*2. Name of faculty or staff member r	requesting activity:			
2. Hame of faculty of stall member i				
* 3. Name of Approver? ②				
	•••			

All questions marked with a red asterisk are required. Blue help bubbles are distributed throughout the electronic module to provide more detailed information and instructions directly related to the individual questions.

Wake Forest Baptist Health	Conflict of Interest Office: (336) 716-9300 / coloffic	ce@wakehealth.ed		New: Outside Activity Forms
« Back		Save 🛛 🖨 Pi	int	Continue »
	proval include writing, merecond on peer review at meetings paid by a cocieties or non-profi	organizations incl panels, visiting p	uding board of directors, officers, manager, or i	
* 2. Name of faculty or staff member r	equesting activity:			
<pre></pre>		Save 🔒 Pi	int	Continue »

Click the blue bubble again to remove the purple help field.

Wake F Baptist H	ealth Conflict of Interest Office: (336) 716-930	0 / coioffice@wakehealt	n.edu	New: Outside Activity Former
« Back		🖹 Save 🔒	Print	Continue »
A. Outside activities that requir	e prior approval include, but are not limited to Industry-pai	d or sponsored consu	ting, speaking, expert testimony, paid court appearan	ices, laboratory testing, teaching, etc.
B. Outside activities that requir profit organization, charitable for		t roles in organizations	including board of directors, officers, manager, or me	edical director of a for-profit company, non-
			ng professorships or lectureships at academic medica anizations, and textbook editorships.	al centers, federal and non-federal study
* 1. For what activity are you	requesting prior approval? 🧿			
O Outside Employment				
O Industry-Funded Non-Cer	ified Educational Activity			
Clear				
Regular or periodic involvem	al consulting agreement or contract with the outside entity ent with a business, company, or other outside activity th rd member, or other responsible official, whether paid or u	at relates to your Instit	tional professional/scholarly discipline or duties, or w	vith any organization (for-profit or non-profit)
Industry-Funded Non-Cert Generally involves a one-tim individuals.	ffied Educational Activity: e organized educational activity funded fully or partially by	r an outside vendor ar	d for which you will attend, organize or speak. One re	equest may be used for multiple WFBMC

The electronic system branches questions based on your answers. To enter a date, click the small calendar icon. You can then select the correct date from the calendar to populate the form.

		Edit: Outside Activity Forms	- OA0000086
Wake Forest [®] Baptist Medical Center	eCOI		
	Conflict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu		
<< Back	Save Exit Hide/Show Errors Print Jump To: Identification -		Continue >>
* 1. For what activity are you requesting p	prior approval? 🧿		
 Outside Employment 			
 Industry-Funded Non-Certified Educational 	Activity		
Clear			
A new request is requered or each contract	ctual outside employment opportunity		
* 1a. Projected S			
7/20/2018	X		
* 2. Name of fac	v » v activity:		
Debra McBride S 1 2 3 4 5	6 7		
* 3. Name of Ap 8 9 10 11 12 1	³ ¹⁴ tor or VP):		
Teresa Anderson 15 16 17 18 19 2			
22 23 24 25 26 2 29 30 31	7 28		
Select date			
<< Back	Save Exit Hide/Show Errors Print Jump To: Identification +		Continue >>

Dropdown lists automatically appear for you to select an individual's name

Wake Forest [®] Baptist Health	Conflict of Interest Office: (336) 716-9300 / c	oioffice@wakeh	ealth.edu	New: Outside Activity Lonno
≪ Back		🖺 Save	⊖ Print	Continue »
B. Outside activities that require approval also in organization, charitable foundation, or academic	clude outside fiduciary and management rol society. vroval include writing, membership on peer re meetings paid by academic societies or non	es in organizat eview panels, v	nsulting, speaking, expert testimony, paid court appearances, laboratory ter ions including board of directors, officers, manager, or medical director of a risiting professorships or lectureships at academic medical centers, federal ations, and textbook editorships.	for-profit company, non-profit
Clear Clear Clear A man of faculty or staff member re A man of Approver?			Enter the first three letters of the individual's last name. A dropdown menu will automatically appear. Choose the correct name	
« Back		🖹 Save	🖨 Print	Continue »

Electronic submission of your Outside Activity request is a two-step process. You must select **both** "Ready to Submit" and "Finish", as indicated by the arrows below.

Wake F Baptist H		Conflict of Interest Office: (2)		0 / coioffice@wakehealth.edu			
« Back		🖺 Save	🕩 Exit	Hide/Show Errors	🔒 Print	Aump To 🗸	Finish
Summary This is a summary of t	the request you h	ave created for approval.					
Title:	Attending Industr		t requested I	by Peter Parker Starting Janua	ary 30, 2020		
End Date: Requestor:	1/30/2020 Peter Parker						
Assigned Depart Approver:							
Vendor(s):	A.P. Pharma, Inc						
Location:	Chicago, Illinois						
Description:	Nurses responsit Managing side et Increased patient						
When you are ready to Ready to Subn		box below and click "Finish"					
« Back		🖺 Save	🕒 Exit	Hide/Show Errors	🔒 Print	Aump To 🗸	Finish

An Outside Activity request that has NOT been submitted remains in Draft status and cannot be approved.

	Submitter:	Marvin F	ernfeather			
Draft	Requestor:	Peter Pa	rker		Assigned Department Approver:	Clark Kent
utside Activity Form	Record Number:	OA0000	0367			
r Version	Date Created:	1/8/2020	3:11 PM	C	Date Submitted:	
tivities	For questions, plea	se contact CO	I Office 336-716-9300.			
Comment	Summary	History				
nd Forms to Requestor Review hdraw by User	Summary Title:		Attending Industry-Funded E			
Withdraw by User			practicaling industry i unded E	ducational Event request	ted by Peter Parker	Starting January 30, 2020
	End Date:		1/30/2020	ducational Event reques	ted by Peter Parker	Starting January 30, 2020
	Requestor:		1/30/2020 Peter Parker	ducational Event request	ted by Peter Parker	Starting January 30, 2020
	Requestor: Assigned Dep	art Approver:	1/30/2020 Peter Parker Clark Kent	ducational Event request	ted by Peter Parker	Starting January 30, 2020
	Requestor: Assigned Dep Vendor(s):	art Approver:	1/30/2020 Peter Parker Clark Kent A.P. Pharma, Inc.	ducational Event request	ted by Peter Parker	Starting January 30, 2020
	Requestor: Assigned Dep	art Approver:	1/30/2020 Peter Parker Clark Kent	istering chemo	ted by Peter Parker	Starting January 30, 2020
	Requestor: Assigned Dep Vendor(s): Location:		1/30/2020 Peter Parker Clark Kent A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for admir Managing side effects of chei	istering chemo	ted by Peter Parker	Starting January 30, 2020
-	Requestor: Assigned Dep Vendor(s): Location: Description:		1/30/2020 Peter Parker Clark Kent A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for admir Managing side effects of chei	istering chemo no	Version	Starting January 30, 2020
	Requestor: Assigned Dep Vendor(s): Location: Description: Vendor Docume	ents:	1/30/2020 Peter Parker Clark Kent A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for admir Managing side effects of chei	istering chemo no	· 	Starting January 30, 2020
-	Requestor: Assigned Dep Vendor(s): Location: Description: Vendor Docume Name Agenda.docx	ents:	1/30/2020 Peter Parker Clark Kent A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for admir Managing side effects of chei	istering chemo no	Version	Starting January 30, 2020
	Requestor: Assigned Dep Vendor(s): Location: Description: Vendor Docume Name	ents:	1/30/2020 Peter Parker Clark Kent A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for admir Managing side effects of chei	istering chemo no	Version	Starting January 30, 2020

Approving Outside Activity Requests

Approval of electronic Outside Activity requests is required by the individual requesting the activity (if different from the individual submitting the electronic form), the Department (e.g. Section head, Department Chair, Director, etc.), and the COI Office. If your electronic approval and signature are required, an email notification will be sent to you with a link to eCOI. Log into the system and go to your inbox.

Wake Forest Baptist Health	Conflict of Interest Office: (336) 716-9300 / coloffice@v	vakehealth.edu	Hello, James Moore *
» My Inbo Contz (COI User Guides	eports	
	all providers. It is due within 30 days for rev • Request Approval of Outside Employment and • You may request approval for Outside Employm	nd upon new hire for exempt and special exempt employees and riew by leadership and the COI Office. Activities ent opportunities and attach the contract or agreement. ed Educational Activities that are funded by industry. (Includes attending, lucational event).	Login James Moore My Home Log Off
	To get started, click My Inbox at the top left of your	screen	

Select "Outside Activities" under "My Roles"

VV Wak Bapt	ke Forest ® tist Health	Conflict of Interest Office: (336) 716-9300 / coloffice@wakehealth.edu	Hello, James Moore +
*	My Inbox	Home Reports	
My Role Annual Direc Outside Activ	losure Inbox	Page for James Moore Welcome to your Personal Folder. Choose the correct role (Disclosure of	or Outside Activity) on the left side of the page to navigate eCOI.
Resourc Conflict of Intu Conflict of Co Policy Annual Disclo Instructions	erest Policy mmitment	My Inbox My Report To Status Complete any items found below. Once complete it will remove the ite Filter by Name Enter text to search for No	em from your inbox.
Supervisor Re Instructions	eview	< page	1 no results > 10 / page

"My Inbox" has two sections. The top section contains Outside Activity requests which require your review and approval. Select the Outside Activity request you wish to review.

Wake Fore Baptist Hea	alth conflict of Interest	DEVELOPMENT Office: (336) 716-9300	/ coioffice@wakehealth.ed	u						
»	My Inbox		Home	Reports	5					
My Roles	Page fo	or James Moore	e							
Annual Disclosure Inbox Outside Activities Inbo		to your Personal Fol	der. Choose the correct r	ole (Disclosure or Outside Ac	tivity) on the left side	of the page to navi	gate eCOI.			
Create	My Inb	ox Pending	Dept Review or COI R	eview My Outside	Activities	Approver				
Outside Activity F	Request	lete any items found be r by 🚱 ID	elow. Once completed, th		_	ection titled "Revie ilter X Clear All	ws Previously Completed"			
Resources	ID	Name		\wedge		Owner	State	Date Submitted	Requestor	Dept Approver
Outside Activities User	Guide OA00	000423 Speaking at Ir 2021	ndustry-Funded Educatio	ar event requested by Tony	Stark Starting Februa	any 14, Stark, Tony	Pending Departmental Approval	1/29/2021	Tony Stark	James Moore
Conflict of Interest Policy Conflict of Commitment F	OA00	000420 Outside Emple	oyment Request Form re	quested by Tony Stark Startin	ig April 15, 2021	Stark, Tony	Pending Departmental Approval	1/29/2021	Tony Stark	James Moore
	2 ite	:ms			<pre>4 page 1</pre>	of 1 🕨				10 / page
	Rev	iews Previous	sly Completed							
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		s							6/1/2021 5/12/2021	م
	Tony	s N	Stark	Covis Pharmaceuticals			12	24000		
	Tony Clark	2 2 4 4	- Stark Kent	Covis Pharmaceuticals Astellas Pharma Inc.	Management		12 2	24000 7000	5/12/2021	٩
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	Tony Clark Clark Tony	- 8 8 5 8	Stark Kent Kent Stark	Covis Pharmaceuticals Astellas Pharma Inc. GlaxoSmithKline Smith and Nephew Wound	Management		12 2 6 3	24000 7000 9000 9000	5/12/2021 4/1/2021 3/31/2021	م م م

The outside activity information is summarized into a table format, and any uploaded documents are saved below the table for your review.

»	My Inbox	Home	Reports			
Status		Speaking at Industry-Funded	Educational Event			
Pending Department Approval	al Submitter: Requestor:	Tony Stark Tony Stark		Assigned Department Approver:	James Moore	
View Outside Activity For	Record Number:	OA00000423				
	Date Created:	1/29/2021 12:20 PM		Date Submitted:	1/29/2021	
Printer Version	For questions, please	se contact COI Office 338-718-9300.				
Departmental Approve Review	 An Outside 	Activity Approval request has been succ	essfully received and routed for review.			
Review	• An Outside	Activity Approval request has been succ	ive an approval message once completed.			
Review	er - An Outside - You w - If you	Activity Approval request has been succ vill receive additional instruction or rece have any questions please contact the	ive an approval message once completed.			
Review	* • An Outside • You * • If you Summary Summary Title:	Activity Approval request has been succ interceive additional instruction or recei- have any questions please contact the in- History	ive an approval message once completed.	Starting February 14, 2021		
Review	* • An Outside. • You * • You * • If you Summary Title: End Date:	Activity Approval request has been succ If receive additional instruction or receive have any questions please contact the History Speaking at Industry-Funde 2/15/2021	ive an approval message once completed. COI Office.	Starting February 14, 2021		
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Departmental Approve Review Log Comment	* • An Outside . • You w • If you Summary Summary Title: End Date: Assigned Dep: Vendor(1): Location:	Activity Approval request has been succ will receive additional instruction or recei- have any questions please contact the re- History 2012 Control of the second second second second 2/15/2021 Control Stark Control Stark att Approver Lipanes Moore Cardiac Presentations Control of the Cardiac Presentation Second Second Control Control Control of the Second Network.	ive an approval message once completed. COI Office.			

If you need to view the outside activity request form in its entirety, select "Printer Version."

	Submitter:	Marvin F	ernfeather		
ng Requestor Approval	Requestor:	Peter Pa	rker	Assigned Department Approver:	Clark Kent
- Activity Form	Record Number:	OA00000	367		
on	Date Created:	1/8/2020	3:11 PM	Date Submitted:	1/8/2020
	For questions, pleas	se contact CO	Office 336-716-9300.		
ies	Summary	History			
vity -					
ent	Summary				
	Title:		Attending Industry-Funded Educational Event rec	uested by Peter Parker	Starting January 30, 2020
by User	End Date:		1/30/2020		
	Requestor:		Peter Parker		
	Assigned Depa				
	Vendor(s):		A.P. Pharma, Inc.		
			A.P. Pharma, Inc. Chicago, Illinois		
	Vendor(s):		A.P. Pharma, Inc.		
	Vendor(s): Location:		A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for administering chemo Managing side effects of chemo		
	Vendor(s): Location: Description:		A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for administering chemo Managing side effects of chemo	Version	
	Vendor(s): Location: Description: Vendor Docume		A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for administering chemo Managing side effects of chemo	Version 0.01	
	Vendor(s): Location: Description: Vendor Docume Name		A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for administering chemo Managing side effects of chemo		
	Vendor(s): Location: Description: Vendor Docume Name Agenda.docx		A.P. Pharma, Inc. Chicago, Illinois Nurses responsible for administering chemo Managing side effects of chemo		

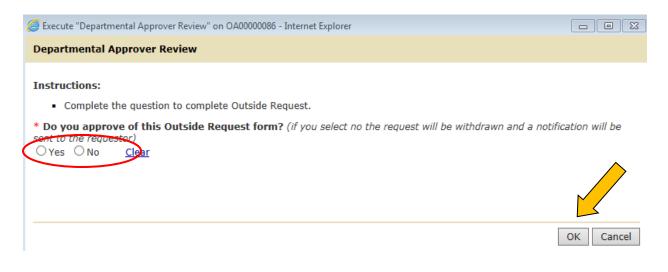
If you are the Requestor and approve of the Outside Activity request, select "Approve Activity," answer any questions that follow, and select "OK."

	>>	My Inbox	Home		Outside Act	FCOI	Research COI			
								🗲 Admin	View	
Sta	atu	15	Event Type: Spe	eaking	at Industry-Funded Ed	ucational Event				
	_		Submitter:	Debra Mo	Bride					
	Pe	ending Requestor Approval	Requestor:	Tony Sta	rk	Assigned Department Approver:	James Moore			
	Edit	Outside Activity Form	Record Number:	OA00000	424					
	_		Date Created:	1/29/202	1 2:12 PM	Date Submitted:	1/29/2021			
	Pri	inter Version	F		04 220 740 0200					
			For questions, please c	ontact COI	Опісе 336-716-9300.					
My		Activities	Summary Hi	istory						
	JR	Requestor								
Ś	/ L	og Comment	Summary							
-			Title:		Speaking at Industry-Funded Edu	cational Event requested by Ton	y Stark Starting April 21, 2021			
) V	Vithdraw by User	End Date:		4/22/2021					
-	14	Vithdrawn by COI	Requestor: Assigned Depart A		Tony Stark James Moore					
←	- 1	and a wir by COI	Vendor(s):	approver:	CardioDynamics, Inc.					
	Δ	dministration	Location:		Las Vegas					
1			Description:		cardiologists Teach about heart conditions req	uiring pacemakers				
0	N	GTask Send Reminder lotice of Pending	/		Networking					
	R	Requestor Review	Vendor Documents:	:						
			Name			Version				
			Agenda.docx			0.01				
			-							

tatus	Event Type: A	ttending	Industry-Funded Educ	ational Event		
	Submitter:	Marvin F	ernfeather			
Pending Departmental Approval	Requestor:	Marvin F	ernfeather	Dej	signed partment prover:	Clark Kent
View Outside Activity Form	Record Number:	OA0000	0364			
Printer Version	Date Created:	12/26/20	19 1:46 PM	Dat	te Submitted:	12/26/2019
	For questions, please	e contact CO	I Office 336-716-9300.			
Pepartmental Approver Review	Information					
	• You wi • If you h	ill receive ad	oval request has been success Iditional instruction or receive a estions please contact the COI	n approval message or		
	• You wi • If you h	ill receive ad have any qu	lditional instruction or receive a	n approval message or		
	• You wi • If you h Summary	ill receive ad have any qu	lditional instruction or receive a	n approval message or Office.	nce completed.	her Starting January 30, 2020
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If you are the Departmental approver, select "Departmental Approver Review"

A pop-up window will appear. Answer the question and select "OK" to submit.



If you are the Department Chair and are reviewing an activity request for **outside employment**, all previously approved Outside Employment requests for this faculty member can be found at the bottom of the summary page under "Active Outside Employment."

Pending Departmental Rec Approval Rec	bmitter: To					
Āpproval Rec		ny Stark				
Datid Article From Dat	questor: To	ny Stark		Assigned Department Approver:	James Moore	
ew Outside Activity Form	cord Number: OA	00000420				
Printer Version Dat	te Created: 1/2	9/2021 11:11 AM		Date Submitted:	1/29/2021	
	questions, please conta	ct COI Office 338-718-9300.				
Activities In:	formation					
Review	 An Outside Employ 	ment Prior Approval Request has been successfully	received and routed for review.			
Log Comment		ive a confirmation once approved or receive addition	al instructions if required.			
	 If you have an 	ny questions please contact the COI Office.				
Su	ummary Histo	ту				
5	Summary for Out	tside Employment Request				
	Title:	Outside Employment Request Form requested by	Tony Stark Starting April 15, 2021			
	Requestor:	Tony Stark				
	Assigned Depart Appr	over: James Moore				
	Clinical Provider or Senior Leader:					
	Vendor(s):	Bard Medical Division				
		Nature of Duties: Advisory board				
	Description:					
	Description.	Days per year:				
		Annual Income: 12000				
	Justification:	Detail scope of work: I am an expert on heart devices. This activity will i Describe added value to your role, patient out will hopefully bring clinical trials to WFBMC				
	Inload of the personal	consulting agreement or contract:			•	
	There are no items to dis					
	Active Outside	Employment				
		Employment	Q + Add Filter X Clear	All		Export
	Active Outside	. ,	Q + Add Filter X Clear		ected Start Date	Export
	Active Outside	. ,				

You can sort the list of previously approved Outside Employment requests by clicking on any of the blue headers or by using the filter option.

Fitle: Requestor:	Outside Employment Request Form requested by Tony Stark Starting April 15, 2021 Tony Stark
Assigned Depart Approver:	James Moore
Clinical Provider or Senior Leader:	
Vendor(s):	Bard Medical Division
Description:	Nature of Duties: Advisory board
	Days per year: Annual Income: 12000
Justification:	Detail scope of work: I am an expert on heart devices. This activity will provide an opportunity to shape future products development Describe added value to your role, patient outcomes, improve service excellence: will hopefully bring clinical trials to WFBMC

If applicable, you can display more than ten active Outside Employment requests on one page by changing the number at the bottom to a larger number (e.g. 100)

of 1 🕨

3/2/2021

3/31/2021

6/1/2021

Approved

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4800

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ummary for C)utside Em	nlovment Red	test			
Title:				m requested by Tony Sta	ark Starting April 15, 2021	(
Requestor:	Tony	<u> </u>				
Assigned Depart Approver:	James	Moore				
Clinical Provider or Senior Leader:	r					
Vendor(s):	Bard	Medical Division				
		e of Duties: ory board				
Description:		per year: al Income: 12000				
Justification: Ipload of the persor here are no items to Active Outsid	develo Descr will ho nal consulting a display	ipment ibe added value to pefully bring clinical greement or contr	your ro trials to	le, patient outcomes, ir	n opportunity to shape future pro nprove service excellence:	ducts
pload of the person here are no items to Active Outsid	devek Descr will ho al consulting a display	ipment ibe added value to pefully bring clinical greement or contr	your ro trials to act:	le, patient outcomes, ir	nprove service excellence:	Export
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Eli Lilly and Company

Covis Pharmaceuticals

3 items

Smith and Nephew Wound Management

"My Inbox" has two sections. The bottom section contains the Outside Employment requests you have previously completed for all your faculty/staff.

Baptist Healt	h ecol	fice: (336) 716-9300	/ coioffice@wakehealth.edu							
»	My Inbox	ŀ	Iome	Report	ts					
My Roles	Page for	James Moore	•							
Annual Disclosure Inbox										
Outside Activities Inbox	Welcome to	your Personal Fold	ler. Choose the correct ro	le (Disclosure or Outside A	ctivity) on the left	side of the page to navig	jate eCOI.			
. .										
Create	My Inbo	c ending:	Dept Review or COI Re	view My Outsid	le Activities	Approver				
	Complete	e any items found be	low. Once completed, the	item(s) will move out of yo	our inbox and into	the section titled "Review	vs Previously Completed"			
Outside Activity Red		y 😧 🛛 ID	Enter text to set	earch for	Q +A	dd Filter 🕱 Clear All				
Resources	ID	Name				Owner	State	Date Submitted	Requestor	Dept Approver
Outside Activities User Gu	ide OA0000	0423 Speaking at In 2021	dustry-Funded Edur	al Event requested by Ton	y Stark Starting F	ebruary 14, Stark, Tony	Pending Departmental Approval	1/29/2021	Tony Stark	James Moore
Conflict of Interest Policy		0420 Outside Emplo	ayment Requered	uested by Tony Stark Start	ting April 15, 2021		Pending Departmental Approval	1/29/2021	Tony Stark	James Moore
Conflict of Commitment Polic	2 item:	5			< page	· · ·	Арргоиз			10 / page
	Revie	ws Previous	ly Completed							
	Filter b	y 🕜 Faculty.First	Na V Enter text to se	earch for	Q +A	dd Filter 🕱 Clear All				Export
	Faculty	.First Name F	aculty.Last Name	Vendors			Days Annually	Annual Income	· Projected St	
	Tony	s	tark	Covis Pharmaceuticals			12	24000	6/1/2021	Q
	Clark	к	ent	Astellas Pharma Inc.			2	7000	5/12/2021	۹
	Clark	ĸ	ent	GlaxoSmithKline			6	9000	4/1/2021	۹
	Tony	S	tark	Smith and Nephew Wound	i Management		3	9000	3/31/2021	۹
	Peter	F	arker	Pfizer, Inc.			4	24000	3/15/2021	۹
	Tony	S	tark	Eli Lilly and Company				4800	3/2/2021	۹
	Peter	-	arker	Johnson & Johnson Pharm	naceutical Resear	rch & Development		3500	2/25/2021	Q

You can sort previously completed Outside Employment requests by clicking on any of the blue headers or by using the filter option.

Filter by 😯	Faculty.First Na	search for	Q + A	dd Filter 🗙	Clear All Export	
Faculty.First Name	Faculty.Last Name	Vendors	Days Annually	Annual Income	Projected Sta	9
Tony	Stark	Covis Pharmaceuticals	12	24000	6/1/2021	(
Clark	Kent	Astellas Pharma Inc.	2	7000	5/12/2021	(
Clark	Kent	GlaxoSmithKline	6	9000	4/1/2021	(
Tony	Stark	Smith and Nephew Wound Management	3	9000	3/31/2021	(
Peter	Parker	Pfizer, Inc.	4	24000	3/15/2021	(
Tony	Stark	Eli Lilly and Company		4800	3/2/2021	(
Peter	Parker	Johnson & Johnson Pharmaceutical Research & Development		3500	2/25/2021	(

If applicable, you can display more than ten active Outside Employment requests on one page by changing the number at the bottom to a larger number (e.g. 100)

Filter by 😧 🚺	aculty.First Na	Enter text to search for	Q +4	Add Filter 🗙	Clear All Export
Faculty.First Name	Faculty.Last Name	Vendors	Days Annually	Annual Income	✓ Projected Start Date
Tony	Stark	Covis Pharmaceuticals	12	24000	6/1/2021 Q
Clark	Kent	Astellas Pharma Inc.	2	7000	5/12/2021 Q
Clark	Kent	GlaxoSmithKline	6	9000	4/1/2021 Q
Tony	Stark	Smith and Nephew Wound Management	3	9000	3/31/2021 Q
Peter	Parker	Pfizer, Inc.	4	24000	3/15/2021 Q
Tony	Stark	Eli Lilly and Company		4800	3/2/2021 Q
Peter	Parker	Johnson & Johnson Pharmaceutical Research & Development		3500	2/25/2021 Q
7 items		↓ page 1 of 1 ▶			10 / page

Tracking Status of Outside Activity Requests

Your Outside Activity requests that are awaiting other individuals to approve can be found under the "Pending Dept Review or COI Review" tab.

Wake Forest [®] Baptist Health	ecor	KGING 2: (336) 716-9300 / coioffice@wake	health.edu			Hello, Clar
» My Inbox	Hon	ne Repo	orts			
My Roles Annual Disclosure Inbox Outside Activities Inbox	Page for Cla Welcome to your		orrect role (Disclosu	re or Outside Activity) on the I	left side of the page	e to navigate eCOI.
Create	My Inbox	Pending Dept Review or	COI Review	My Outside Activities	Approver	
Outside Activity Request						Export
Resources	ID	Name	cational Event reque		Approver	itatus lending Requestor Q
Outside Activities User Guide Conflict of Interest Policy	1 items	November 20, 2019	4 page			10 / page
Conflict of Commitment Policy						

You will receive an email notification when an Outside Activity request has completed electronic routing and is Approved/Disapproved. Your completed Outside Activity requests can be found under the "My Outside Activities" tab.

Wake Forest Baptist Health	eCOI STAGING flict of Interest Office: (336) 716-9300 / coioffice@wakehealth.edu	Hello, Marvin Fernfeathr
» My Inbox	Home Reports	
My Roles Annual Disclosure Inbox Outside Activities Inbox	Page for Marvin Fernfeather Welcome to your Personal Folder. Choose the correct role (I	(Disclosure or Outside Active reference) to help age to havigate eCOI.
Create	My Inbox Pending Dept Review or COI Revie	iew My Outside Activities Approver
Outside Activity Request	Outside Activities	
Resources	ID AName	Owner State Dept Date Requestor Approver Submitted
Outside Activities User Guide	OA00000352 Outside Employment Request Form request Gloria Ana Abad Starting June 26, 2019	ested by Fernfeather, Approved Teresa 6/14/2019 Gloria Ana Marvin Anderson Abad
Conflict of Interest Policy	OA00000354 Outside Employment Request Form request Marvin Fernfeather Starting June 28, 2019	
Conflict of Commitment Policy	2 items	<pre>4 page 1 of 1 > 10 / page</pre>

Departmental reviewers can access all the Outside Activity requests (e.g. outside employment and non-certified educational activities) that they have approved or disapproved for their faculty/staff members by searching under the "Approver" tab.

Wake Forest ® Baptist Health	ecor	KGING e: (336) 716-9300 / coloffice@wakehealth.edu				fello, Clark
» My Inbox	Hom	ne Reports				
My Roles	Page for Cla	ark Kent				
Outside Activities Inbox	Welcome to you	r Personal Folder. Choose the correct role (Disclo	osure or Outside Activity) on the left	side of the	navigate eCOI.	
Стеаtе	My Inbox	Pending Dept Review or COI Review	My Outside Activities	Approver		
Outside Activity Request					Expo	ort
Resources	ID	Name		Status	Date Submitted	
	OA0000364	Attending Industry-Funded Educational Event reg January 30, 2020	uested by Marvin Fernfeather Starti	ng Pending COI	12/26/2019	Q
Outside Activities User Guide						

Post Approval Edits

Comments and documents can be uploaded after the electronic request form has been approved. Select "Log Comment."

Wake Forest* Baptist Health	Conflict of Interest Office: (33		0 / coioffice@wakehealth.edu		Hello, Marvin Fer
» My Inbox	Home		Reports		
Status	Event Type:				
	Submitter:	Marvin Fe	ernfeather		
Approved	Requestor:	Gloria An	a Abad	Assigned Department Approver:	Teresa Anderson
View Outside Activity Form				Date Approved:	6/14/2019
Printer Version	Record Number:	OA00000	352		
G	Date Created:	6/14/2019	10:02 AM	Date Submitted:	6/14/2019
My Activities					
Log Comment		istory			
			Employment Request		
	Title: Requestor:		Outside Employment Request Form req Gloria Ana Abad	uested by Gloria Ana Aba	d Starting June 26, 2019
		Approver:	Teresa Anderson		
		Clinical Provider or Senior Leader:			
	Clinical Provider of	or	Yes		
	Clinical Provider of	or	Abbott Cardiovascular Systems Inc.		
	Clinical Provider of Senior Leader:		Abbott Cardiovascular Systems Inc. Nature of Duties: Consulting		
	Clinical Provider o Senior Leader: Vendor(s):		Abbott Cardiovascular Systems Inc. Nature of Duties:		

A pop-up window will appear. Type your comments in the box and upload or drag and drop any documents you would like to add. Then select "OK" to save and exit.

🤗 Execute "Log Comment" on OA00000111 - Internet Explorer	
Log Comment	
 Instructions: Provide your comment below. it will appear in the history log and visible by anyone with access to this Or request form. 	utside Activity
* Comments:	
Add	
Name Version	
There are no items to display	OK Cancel

For questions or assistance, contact the COI Office at <u>coioffice@wakehealth.edu</u> or 336-716-9300.