



**User Guide: Annual Conflict of Interest Disclosure Questionnaire**  
**Navex Disclosure Management System**

**Date:** 1-28-2025

**Audience and Purpose:** The purpose of this guide is to assist users with completing the annual conflict of interest (COI) disclosure questionnaire in the Navex Disclosure Management system.

**Accessing Navex:** The easiest way to access the annual COI disclosure in Navex is through the [HSC Conflicts of Interest website](#), where the current URL is posted under the Navex Disclosure Management System tab. You can also use the link provided in the email sent to you at the beginning of February.

**Timing:** University employees are required to complete a COI disclosure every year whether they have a conflict to disclose or not. Currently, the University requires all Health Sciences employees to submit a disclosure in February. New employees must submit a disclosure within 30 days of their start date. In addition to this requirement, employees are required to update their disclosure within **30 days** of acquiring a new interest or any changes to their existing disclosure.

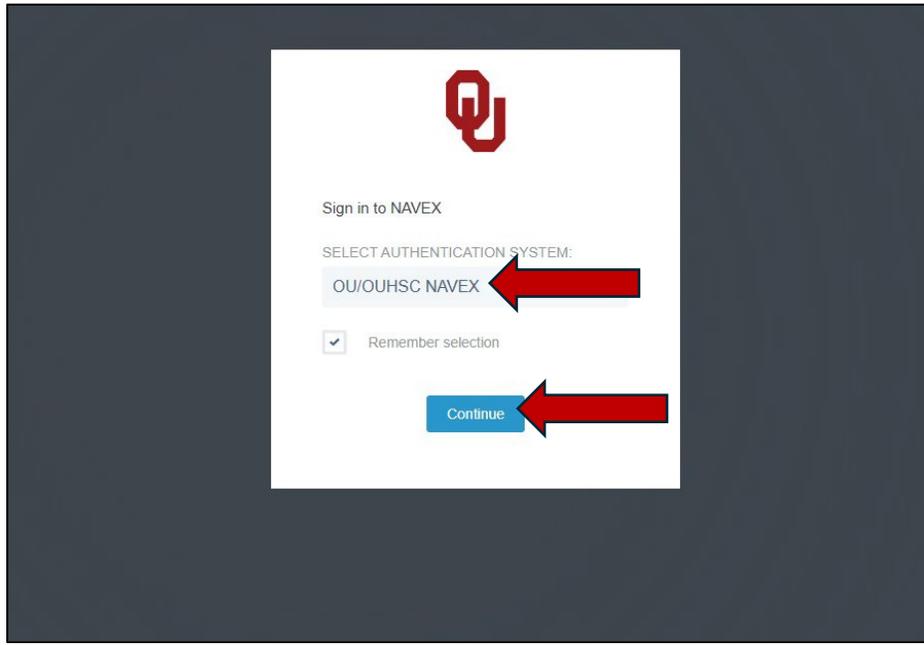
**Amending Disclosure:** Please visit the HSC Conflicts of Interest website for instructions on how to amend a submitted disclosure form.

**Help:** For additional help or questions, please email the COI Office at [COIHSC@ouhsc.edu](mailto:COIHSC@ouhsc.edu) .

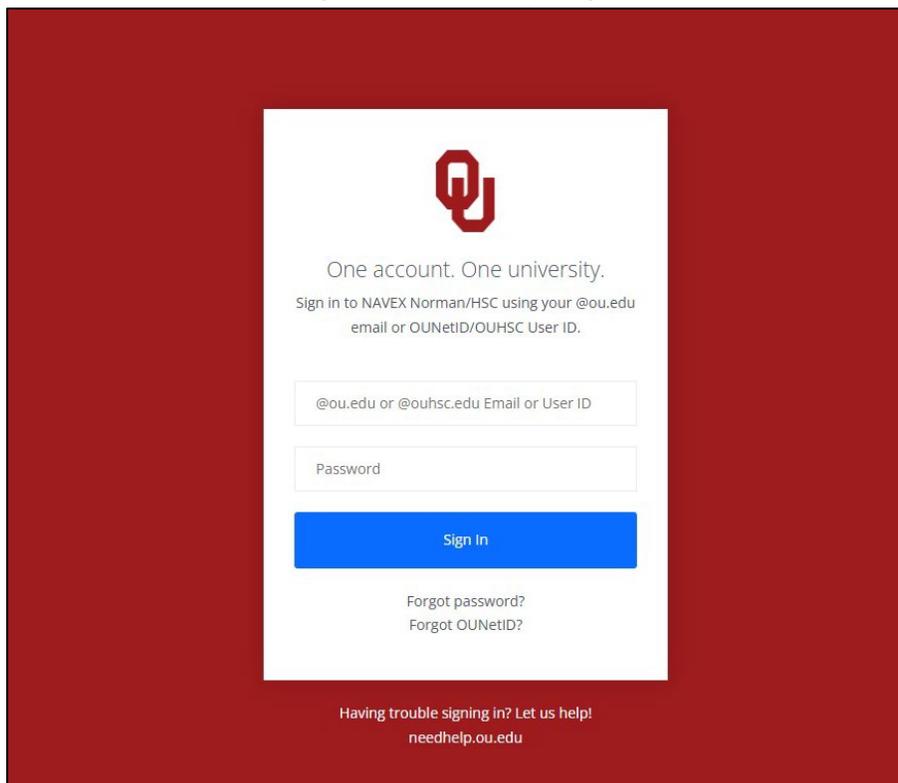
-End-

1. Locate the current URL to Navex. The easiest way to locate this is through the HSC Conflicts of Interest website under the Navex Disclosure Management System tab. You can also use the link provided in the email sent to you at the beginning of February.
2. You will first be prompted to select your authentication system. Select *OU/OUHSC* and click *Continue*. (See Figure 1.)
3. Log into the system using your University Credentials. (See Figure 2.)

**Figure 1: Authentication System**



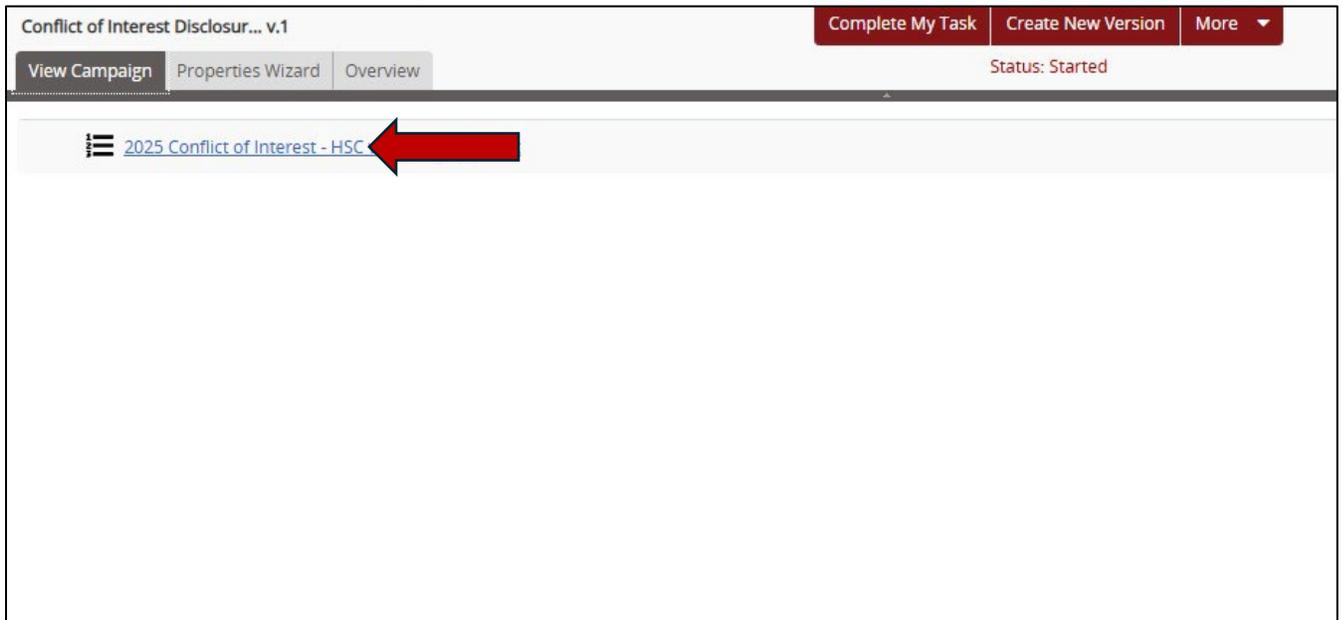
**Figure 2: University Login**



4. After logging into the system, click on the current COI disclosure campaign under the *View Campaign* tab. (See Figure 3.) This link will be labeled with the current year (e.g., 2025 Conflict of Interest- HSC).

Important Note: This page may not be visible for some users. If you cannot see the page shown in Figure 3, please proceed to the next step in this user guide.

**Figure 3: Current COI Disclosure Campaign**



5. The next screen will display user information that is imported from PeopleSoft. After reviewing the information for accuracy, click *Continue*. (See Figure 4.) Please contact your business administrator to correct any errors that are displayed on this page. Any errors displayed on this page will not prevent you from completing your disclosure form.

**Figure 4: User Information**

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### Before we get started...

This Questionnaire will take approximately 10 minutes to complete.

This information will be submitted with your response. Please contact your administrator if it is incorrect or needs updating.

^ Responder Information

Responder Name:

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Job Title:

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HRID:

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Email:

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Manager:

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On Leave:

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Site Name:  
Health Sciences Center

 [Continue](#)

6. The *Overarching Introduction* is the first page of your disclosure form questionnaire. (See Figure 5.) Read the instructions on this page and click *Next* to continue.

**Figure 5: Introduction**

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## Overarching Introduction

**Instructions**

- Please answer the screening question for each disclosure category. In most cases, if you answer “no,” you can advance to the next page and question. If you answer “yes,” the questionnaire will reveal additional questions.
- If you partially complete the questionnaire, log back into the system using the link in your email. The system should save the responses previously provided and you can continue completing the form.
- Please answer all questions completely, even if you have disclosed the relationship or scenario previously.

**Questions**

- If you have any questions, please email the Conflict of Interest Office at [COIHSC@ouhsc.edu](mailto:COIHSC@ouhsc.edu).
- If you are trying to update or make a change to your submitted disclosure, please visit the [Conflict of Interest Office website](#) for instructions.

Thank you for supporting a strong culture of compliance and ethics which sustains the brand and reputation of the University of Oklahoma.

 [Next](#)

7. Each page of the disclosure form will consist of a topic, information about that specific topic, and an initial screening question for you to answer. (see Figure 6.)

Read the information provided and then answer the screening question. You may need to answer additional questions based on your responses.

Answer all questions that are revealed and click *Next* to continue.

**Figure 6: Screening Questions**

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### Outside Employment or Professional Activities

Any external professional activity or employment undertaken outside the University of Oklahoma, whether **paid or unpaid**, must be disclosed.

**Examples of outside activity that must be disclosed include, but are not limited to:** Consulting, advising, adjunct professorships, courtesy appointments at other Universities, board membership, officership, speaking activity, advisory boards, any professional activity that may be related to your research, clinical trials, or University role.

**Examples of outside activity not requiring disclosure include, but are not limited to:** Volunteer or board activity for religious or social organizations, other non-professional activity.

**Have you engaged in any outside professional activity or employment in the last 12 months, or do you plan to do so in the next 12 months, in addition to your employment at the University of Oklahoma? \***

Yes 

No

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8. Certain screening questions may have multiple responses. For example, you may have more than one Family Member working on campus who need to disclose.

In these cases, you will answer “yes” to the initial screening question (see Figure 7) and then answer the questions that are revealed.

Once all of the questions are answered, you may click *Add Another Relationship* to reveal another set of questions for the additional relationship. (See Figure 8.) You may repeat this process for each relationship you need to disclose.

When finished, click on *Next* to move to the next screening question and category.

**Important Note:** The remainder of the disclosure form behaves in a similar manner. For each relationship, activity, or business interest disclosed, you will have the option to add another entry at the bottom of the page.

**Figure 7: Multiple Responses**

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### Relationships Between University of Oklahoma Employees

A conflict of interest may arise if a Family Member is employed by or is applying for employment at the University of Oklahoma.

For the purposes of this Questionnaire, the term "Family Member" is defined as any individual who is a spouse/domestic partner, parent, child, stepchild, or sibling of an Employee or a member of the Employee's household.

This type of conflict could create the appearance of impropriety, bias, undue influence, favoritism, or cause others to question your ability to make objective decisions.

Working with a Family Member is not prohibited, but disclosure is required. Appropriate action should be taken to ensure that conflicts of interest are either avoided or appropriately mitigated and managed.

Note: Employees with Family Members who are applying for employment will need to update their disclosure form when the Family Member is formally hired.

**Do you have a Family Member as defined above who also works for the University of Oklahoma or who is currently applying for a role at the University of Oklahoma? \***

Yes 

No

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Figure 8: Multiple Responses

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Sibling  
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Member of my household

Is this person currently in, or being considered for, a position directly or indirectly in your reporting chain of command? \*

Yes  
 No

Is this person currently, or going to be, collaborating with you or a member of your department on research projects? \*

Yes  
 No

Are you in a position that is responsible for, or can influence decisions on hiring or compensation for this person? \*

Yes  
 No

Have you previously disclosed this relationship? \*

Yes  
 No

[Add Another Relationship](#) 

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9. The last page of the disclosure form is the employee acknowledgement and certification. You must read the information on this page and click *I Agree*. (See Figure 9.) Next, click on *Review* to move to the next page and submit your disclosure form.

**Figure 9: Acknowledgement**

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## Acknowledgement

**Board of Regents Individual COI Policy**

I have reviewed the [OU Board of Regents Individual COI Policy](#) and agree to comply with its requirements. I have reviewed OU's Standard of Conducts and understand that I am responsible for knowing and following these standards.

**Official Disclosure**

As a member of the OUHSC community, I understand that as provided by policy, this disclosure form is the only authorized means by which I may make disclosures regarding outside activities and financial interests that create or have the appearance of creating individual conflicts of interest. I understand that no action outside of submitting a disclosure form can result in approval of an outside activity or financial interest.

**PHS Financial Conflict of Interest**

I certify that I will follow the PHS Financial Conflict of Interest (FCOI) regulations, [42 CFR 50 Subpart F](#).

**Compliance Reporting Options**

I understand that if I have compliance related concerns, questions, violations, or issues to report, I can report these using any of the options below:

- [Supervisor or COI Office](#): I can report concerns, questions, violations, or issues to my supervisor, or to the COI Office via email to: COIHSC@ouhsc.edu. All reports made to supervisors and to the COI Office will be handled in a confidential manner.
- [Compliance Helpline](#): I can contact the 24-hour anonymous Confidential Compliance Helpline, toll-free, at 1-866-836-3150.
- [OU Report It!](#): I can report anonymously online via the OU Report It! hotline. [Link to OU Report It!](#)

**Declaration of Disclosure**

By checking the box below, I certify and agree that the information I have provided is true, accurate, and complete. I will amend this disclosure form **within 30 days** of any changes that may: (a) give rise to a new conflict of interest of commitment, (b) eliminate a conflict previously disclosed, or (c) substantively change this disclosure or any related COI Management Plan.

I agree

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10. This page displays a summary of the content included on your COI disclosure. (See Figure 10.)

Figure 10: Disclosure Summary

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Click the Submit button at the end of this page to complete your response

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^ Response Information

**Questionnaire Name:**  
2025 Conflict of Interest - HSC v4 - Campaign Test

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**Date Started:**  
2025-01-27 04:42:15 PM

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^ Responder Information

**Responder Name:**

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**Job Title:**

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**HRID:**

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**Email:**

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**Manager:**

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**On Leave:**  
No

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**Site Name:**  
Health Sciences Center

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^ Outside Employment or Professional Activities

Have you engaged in any outside professional activity or employment in the last 12 months, or do you plan to do so in the next 12 months, in addition to your employment at the University of Oklahoma?

No

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^ Relationships Between University of Oklahoma Employees

Do you have a Family Member as defined above who also works for the University of Oklahoma or who is currently applying for a role at the University of Oklahoma?

No

11. You must click *Submit* to officially complete your COI disclosure. (See Figure 11.) You also can click *Return to Questionnaire* to return to your disclosure form and amend your responses.

**Figure 11: Disclosure Summary and Submit Button**

The screenshot displays a web-based disclosure form with two main sections. The first section, titled 'Malign Foreign Talent Recruit Program', asks if the user is participating in such a program and has a 'No' response. The second section, titled 'Gifts & Entertainment - Received', asks if the user or a family member has accepted a gift. Below this question are several text input fields for: 'Who received this gift?', 'Relationship to you.', 'Description of the gift received by you or your Family Member.', 'Relationship of the gift provider to the University.', and 'Total dollar value of the gift(s)'. At the bottom of this section is a checkbox area for selecting job functions. At the bottom right of the form, there are two buttons: 'Return to Questionnaire' and 'Submit'. A large red arrow points directly to the 'Submit' button.

12. Once you have submitted your COI disclosure form, you will see a confirmation message. (See Figure 12.)

**Figure 12: Confirmation**

