

# Completing the Annual Disclosure in the Disclosures Module in Insight

## How-To Guide

Insight is Emory University's platform for managing research protocols and related administrative workflows. The annual disclosure process is required for Emory faculty and staff and helps ensure transparency around outside interests, financial relationships and potential conflicts of interest. This guide provides step-by-step instructions for completing the **Annual Disclosure** with instructions for answering required questions, disclosing external activities and submitting the completed form.

### Complete the Annual Disclosure

1. On the Dashboard, you will see the Annual Disclosure form appear under the Disclosures module in the Activates for Review list. Click **Annual Disclosure form required**. *The Emory Annual Disclosure form instruction page opens.*
  - a. You can also navigate here by clicking **Disclosures** on the Dashboard or the menu on the left, then clicking **Activities for Review**.
  - b. The Annual Disclosure form is required for completion between December and February.
2. Review the Emory Annual Disclosure Form instructions and click **Start Annual Cycle**. *The Annual Disclosure form opens.*
3. Answer the questions by clicking the **button** next to each appropriate answer. You will be asked whether you are an Emory University or Emory Healthcare employee, whether you are faculty or staff and whether you are engaged in research. Additional questions will ask about outside interests, financial relationships and sponsored activities. *Question fields update dynamically as you respond and may prompt you for more details.*
4. Answer the questions by clicking the **button** next to each appropriate response and type details into the **text fields** that display. *As you respond, the fields update dynamically, and "Yes" answers prompt you for more details.*
  - a. Questions will cover staffing details, research participation, outside interests, financial relationships and sponsored activities.
5. In the **final field** of this section, enter details about any other potential conflicts, then click **Next**. *The Table of Financial Interests opens.*
  - a. Leave this field blank if it is not applicable.
6. Review the **Table of Financial Interests**. If all your external activities are listed, click **Confirm All**.

- a. If something is missing, continue to the next step.
7. Click **Add Entity** to disclose a new external activity. *The Interest Disclosure form opens.*
8. In the search field at the top of the page, type the **name of the entity** linked to your external activity, then select the **company or organization** from the list of results. *Answers to the entity-related questions will automatically populate based on existing system data for that entity.*
9. Review the auto-filled information about the entity and confirm its accuracy.
10. Continue answering questions on this page, selecting the button by each correct answer and entering information into fields as prompted.
11. Once all responses are complete, navigate to the right of the screen, and confirm that the **Submission Checklist** shows the message, **All validations in this area have been completed.**
12. Verify that the **Submission Checklist** shows: “All validations in this area have been completed.”
  - a. This indicates the form is complete and ready to submit.
13. At the bottom right of the screen, click the checkbox by the message, **I have answered fully and to the best of my ability.** Then click **Submit**. *The Annual Disclosure is submitted successfully.*

## Additional Resources

- Visit the [Project Insight SharePoint page](#) for additional training materials and project updates.