Conflict of Interest Annual Disclosure Process
Approver Quick Reference Guide

Questions?
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Helpful Resources
Conflict of Interest Policy
CDS FAQs
CDS User’s Guide
Conflict of Interest Training

Conflict of Interest Indicated?

No

Confirm No Conflict

→ If Conflict, Return to Discloser
→ If No Conflict, Quick Approval

Yes

Is It a True Conflict?

No

Indicate No Mgmt Plan Needed

Approve

OCOICM Reviews to Confirm Not a True Conflict

Yes

1. Review Details
2. Prepare Mgmt Plan (use pre-written plans, if possible)
3. Approve

OCOICM Finalizes Mgmt Plan

1. Notify Discloser
2. Certify Plan