

Annual Form vs Project Form vs Revision Form

How to identify which form needs to be edited

Annual Form

- You will need to fill out the Annual Form on an annual basis because Federal regulations require that significant financial interests (SFIs) be updated at least once a year.
- Once completed, the Annual Form will become the basis for all Project Forms going forward.
- If your SFIs change after the creation of the Annual Form, the form can be revised and edited.

Project Form

- A Project Form is needed for each proposal that requires a financial conflict of interest disclosure.
- The project Form asks you to verify SFIs previously disclosed and asks additional questions regarding the relationship between those SFIs and the proposal being submitted.
- If you need to add or delete a currently listed SFI, any other affected project disclosures should be reviewed, and revised and resubmitted as needed.

Annual & Project Revision Forms

- Both the Annual Form and the Project Forms may be revised if you need to add or delete SFIs.
 - Modify the Annual Form when an SFI changes.
 - Modify a specific Project Form when an SFI modification directly affects the project. Example: A spouse starts employment with a subcontractor or you divest yourself of a financial interest related to the sponsor.

If you have any questions, please contact the UI compliance coordinator

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