UFOLIO QUICKSTART GUIDE

01

Click START HERE to create a new Disclosure

START HERE

Select "Start here" to create a disclosure or certify you have nothing to disclose. You will need to create a separate disclosure for each activity/interest you need to disclose. Everyone must create at least one disclosure form every 365 days, even if you have nothing to disclose.

02

Basic Information

Disclosure Type

Select "Continue" to reach the "Disclosure Type" page. Select the type of disclosure you are submitting from the list of options, or select the last option if you have nothing to disclose. Select the ❓ symbol above the first disclosure type for definitions of words used in the descriptions.

03

Disclosure Type

Sensitive Information

Once you have selected your disclosure type, hit "Continue" to proceed to the "Sensitive Information" page.* UFOLIO is not designed to retain sensitive information like social security numbers. Read the statement and acknowledgment and check the box to continue.

04

1. External entity:

If entity not listed, enter a single/specific entity name here:

An external entity is required for every disclosure in UFOLIO. You may select an entity from the drop-down list, or enter a new entity in the free text box. If you use the free text box, please provide as much information about the entity as possible in the subsequent fields.

05

Entity Information

Leadership Roles

Hit "Continue" and you will be brought to the e-form specific to the disclosure type you selected (for example, "Leadership Roles"). Required questions are marked with a red asterisk. Answer each question as fully and accurately as possible to reduce questions from reviewers.

06

Time Commitment

1. * Approximately how long do you expect this activity or relationship to last in total? ❓

Select "Continue;" if your disclosure involves a time commitment, you will be brought to the "Time Commitment" page to provide information about the duration and time commitment for the activity. If you are disclosing an interest with no time commitment, you will bypass this page.

07

Certification

Submit Now/Later

Select "Continue;" read the the statement and certify by entering your initials in the text box. Select "Continue" and you will have the option either to submit the disclosure immediately, or save it and submit later (the latter option is useful to review your responses before submission.)

*If you selected "Nothing to Disclose," the next page will simply require your initials for certification; you will be able to submit your certification on the following page.

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Additional options

If you save your disclosure and do not submit it:

Pre Submission

Edit Disclosure

You will be brought to the "Disclosure Workspace." You may select "Edit Disclosure" from the left sidebar to make changes to your disclosure. Once you are ready to submit, simply select "Submit Disclosure" from the left sidebar. Once submitted, your disclosure will route to your supervisor according to UF's job records.

If you can't submit your disclosure without Reassigning the Level 1 Reviewer:
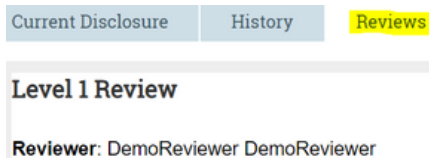
👤+ Reassign Level 1 Reviewer

💬 Add Public Comments

✈ Send Email

← Withdraw

This occurs because you do not have a supervisor currently listed in UF's job records; you will have to manually select the appropriate person via the "Reassign Level 1 Reviewer" activity before you're able to submit. The new reviewer will have to confirm your selection before they can submit their review. To permanently correct your supervisor, please contact your HR liaison.

To confirm your disclosure has routed to the correct Level 1 Reviewer:

| Current Disclosure | History | Reviews |

Level 1 Review

Reviewer: DemoReviewer DemoReviewer

You can ensure your disclosure has been routed to the correct person by navigating to the "Reviews" tab. The name of your supervisory reviewer will be listed under the "Level 1 Review." If the wrong reviewer is listed, you can still use the "Reassign Level 1 Reviewer" activity to correct this.

To check the status of your disclosure:

When you pull up the disclosure, there is a status listed in the disclosure header. Select the ❓ to get additional information (the bullet points in the below image). There is also a timeline graphic just below the header status.

Disclosure Status: A reviewer has requested information from you. Please select 'Submit Clarifications' on the left menu bar to respond and route your disclosure back to the reviewer. ❓

- To see the reviewer's message, please navigate to the 'Comments and Clarifications' tab.
- To respond, please select 'Submit Clarifications' on the left menu bar.
- You will be able to write a message and attach documents, if applicable.

▼

✓ Submitted — 👤 **Level 1 Review** Clarifications Requested — 👥 Level 2 Review

| Current Disclosure | History | Comments and Clarifications | Documents |