UFOLIO Functionality FAQ

This document has two versions: this version has no screen shots and is intended for printing. Please follow this link for the version with screen shots intended for screen use.

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1. **How do I access and log in to UFOLIO?**

   - Log in to UFOLIO with your Gatorlink credentials at https://ufolio.compliance.ufl.edu/ with an internet browser OTHER than Internet Explorer (e.g. Google Chrome, Mozilla Firefox, etc.)
     - The remaining FAQ instructions will begin after you are already logged into UFOLIO.

Disclosers

2. **How do I see my active disclosures that have already been reviewed?**

   - From the UFOLIO Home page, either select the "Renewable Disclosures" tab or button.
     - This tab contains all approved disclosures you have submitted that are not expired.

3. **How do I see all the disclosures I have ever created, regardless of status?**

   - From the UFOLIO Home page, either select the "My Disclosure Portfolio" tab or "Disclosure Portfolio" button.
     - This tab contains all disclosures you have created, including those that you have not yet submitted, are expired, or have been discarded.

4. **How do I add an attachment to a disclosure that I've already submitted but is still under review?**

   1. Select the "Under Review" tab.
   2. Select the disclosure the needs the attachment.
   3. Select "Add Public Comments" from the left menu bar.
   4. Enter a descriptive comment and select "+Add."
   5. Choose the file from your computer and select "OK" twice.

5. **Where do I go to see the comments from a clarification request?**

   1. Select the "Action Items" tab or scroll down on the home page to see "Disclosures requiring action on my part."
   2. Select the appropriate disclosure (the status should have the words "Clarification Requested").
   3. Select the "Comments and Clarifications" tab. This tab logs all approval comments, clarification requests, responses to clarifications, and public comments, from most recent to least recent.

6. **How do I respond to a clarification request?**

   1. For a **regular** clarification request from Level 1 or Level 2 Reviewers; your email notification will say "UFOLIO Clarifications Requested."
      a. Select the "Action Items" tab or scroll down on the home page to see "Disclosures requiring action on my part."
      b. Select the appropriate disclosure (the status should have the words "Clarification Requested").
      c. Select "Submit Clarifications" on the left menu bar.
      d. Type in your comments, attach any requested documentation, if applicable, and select "OK."
      e. Select "OK." The disclosure will revert back to the reviewer who requested clarification.

   2. For an **ancillary** clarification request; your email notification will say "Ancillary Clarification Requested."
      a. Select the "Action Items" tab or scroll down on the home page to see "Disclosures requiring action on my part."
      b. Select the appropriate disclosure (the status should say "Level 2 Review").
      c. Select "Contact Ancillary Reviewer" from the left menu bar.
      d. Select the appropriate ancillary, type your comment/ clarification, and attach any requested documentation, if applicable.
      e. Select "OK." The disclosure will revert back to the ancillary reviewer who requested clarification.

7. **How do I edit my disclosure form when clarification has been requested from me?**

   1. Select the "Action Items" tab or scroll down on the home page to see "Disclosures requiring action on my part."
   2. Select the appropriate disclosure (the status should have the words "Clarification Requested").
   3. Select "Edit Disclosure" on the left menu bar.
   4. You will be brought to a screen where you can edit your disclosure. Select the appropriate section to edit on the left menu bar and use the prompts on the bottom right of the screen to save or continue.

8. **I submitted a disclosure in error. How can I make changes or pull it back from the review chain entirely?**

   1. Select the "Under Review" tab.
   2. Select the appropriate disclosure.

3. Select "Withdraw" from the left menu bar.
4. Enter comments if needed and select "OK." The disclosure will return to "Pre Submission" status.
5. To update your disclosure, select "Edit Disclosure" on the left menu bar. To end all processing, select "Discard" on the left menu bar.

9. Where can I see status updates on my disclosures?

1. Select the "Under Review" tab.
2. On this tab, you can see the current status of each disclosures in the "Status" column. If an ancillary reviewer has been assigned to your disclosure and still needs to review it, the "Ancillaries Pending" column will say "yes."
3. To see further updates, select the appropriate disclosure and navigate to the "History" tab.

10. I thought I submitted my disclosure, but it's in my Action Items tab and says the status is "Pre Submission." What should I do?

1. Select the disclosure in question from your home page under "Disclosures requiring action on my part."
2. If the disclosure form is complete, select "Submit Disclosure" on the left menu bar.
    a.   If the disclosure form is NOT complete, select "Edit Disclosure."
3. If you receive an error message when you attempt to submit, select the first hyperlink in the "Jump To" column, and UFOLIO will take you directly to the first field that needs to be completed. Complete all required fields and use the navigation buttons on the bottom right of the screen to save, continue, and submit.

11. How do I renew a previously approved disclosure or update a disclosure that's changed since it was approved?

1. Select the "Renewable Disclosures" tab or button.
2. Select the appropriate disclosure.
3. Select "Modify or Renew Disclosure" on the left menu bar and select "OK" on the window that pops up.
4. Use the buttons on the bottom right of the screen to navigate through your renewal and make any adjustments as necessary. When the renewal/modification is ready, follow the on-screen prompts to submit your disclosure.

12. I have received a disclosure for someone who now reports to someone else. How do I remove it from my approval queue?

1. If you know the employee's new supervisor:
    a. Select the disclosure in question from your home page under "Disclosures requiring action on my part."
    b. Select "Reassign Level 1 Reviewer" from the left menu bar.
    c. A window will pop up. Search for the new supervisor in the "New Level 1 Reviewer" field and add comments as needed.
    d. Select "OK." The new supervisor must confirm your selection for the disclosure to be reassigned to them.
2. If you do NOT know the new supervisor, please contact the COI Program at UFOLIO-help@ufl.edu for assistance.

13. I have questions for the discloser or want them to make a change to their disclosure. How do I do that in UFOLIO?

1. Navigate to the disclosure in question and select "Request Clarifications" on the left menu bar. A new window will pop up.
2. Select "Discloser" and type your question or instructions in the "Comments" box. Select "OK" and the disclosure will route back to the discloser for a response.

14. I am reviewing a disclosure for an activity that is part of the employee's UF job and is not an outside activity at all. Can I stop the review process, and how?

1. Navigate to the disclosure in question and select "Discard as Inside Activity" on the left menu bar.
2. In the new window, enter your explanatory comments. The discloser will receive an email notification with your comments, and the disclosure will be removed from the review chain and archived.

15. I need to append additional information to a pending disclosure that I've already approved. How do I do that?

    a. Select the "Disclosures I Reviewed" tab.
    b. Select the appropriate disclosure. It may be useful to change the visible to disclosures to 100 per page.
    c. Select "Add Public Comments" from the left menu bar.
    d. Enter a descriptive comment and select "+Add" if you need to attach documents.
    e. Select "OK." The COI Program will receive an email notification that you have added a public comment, and anyone with access to the disclosure will be able to view your comment and any attachments you uploaded.

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