

Discloser Quick Start Guide

May 2025

Complete an Initial Disclosure Profile Disclosure Profile Update in Research Category Complete a Pre Approval Request (PAR) Respond to a Clarification Request Request Clarification

> UF RISC Office Conflicts of Interest Program 352-273-9174 uf-coi@ufl.edu https://coi.ufl.edu

Complete an Initial Disclosure Profile

- 1. Go to <u>https://coi.ufl.edu</u> to log in to <u>eDisclose</u> with your GatorLink credentials
- 2. From your **Dashboard** Home Screen, go to **COI** workspace

FLORIDA	eDisclo	se						Hello,
	Dashboard		COI					
Page for								Help
Recen	ntly Viewed	My Inbox My Inbox Filter by 😧	My Reviews	 Enter text to search 	Q + Add Filter	🗙 Clear All		٥
display.		ID	Name		Date Created		State	Coordinator
		DP0000	Disclosure	Profile for	4/12/2025 5:31 AM	5/4/2025 2:42 AM	Action Required	
		1 items			✓ page 1 of 1 ▶			25 / page

3. Your new Disclosure Profile will show > Action Required > review the Instruction Center

Select Edit Disclosure Profile to complete Action Required

eDisclose	9							Hello,	•
Dashboard	COI								
Disclosures Requests	Certifications	Plans	Triggering Events	Reports	Meetings	Help Center			
COI > Disclosures > Disclosure Profile Action Required	^{for} Disclosure F	rofile for						Help	
Request Pre-Approval			Instruct	ion Center					
Complete Disclosure Profile Update	Action Required Review disclosure infr and accurate, click on Go to the Instructions box to certify that the Review disclosure infr and accurate, click on Review disclosure infr and accurate, click on Edit Disclosure P	ormation in the dis the Complete Di and Policies page materials have be ormation in the dis the Complete Di the Complete Di	sclosure profile. When all dis isclosure Profile Update b e to review training and edu- en accepted. sclosure profile. When all dis isclosure Profile Update b sclosure Profile Update b	sclosure information utton. cation materials. (sclosure information utton. sclosure information utton.	on is current	Reason The disclosure profile is new and has never been completed Discloser's training is out of date A category associated with the discloser requires renewal Discloser was added to a research project			
	Disclosures Tr	aining Hist sed any interests	s. Reference the Instruction	Center to take the	appropriate s	teps of completing a disclosure update	2.		

4. Review **Instructions and Policies** and **certify completion of COI Training** by checking after the statement: *"I certify that I have read and understood the education materials presented to me"*

Select Continue



- 5. Review Entity Disclosure Information on financial interests and/or outside activities to report
 - > Select "Yes" or "No" to Question 1: Do you have any financial interests and/or outside activities?
 - If "No", select Continue

	ose		He	llo,	•
Validate Instructions and Policies Entity Disclosure Information Complete Disclosure Profile	Editing: DP000 Intity Disclosure Information .* Do you have any financial interests and/or outside activities? Yes No Clear		Go to forms menu	Print •	Help
		🛛 Exit	B Save	Continu	e 🔿

6. If "No" is selected, go to Step 8, p. 9

If "Yes" is selected for financial interests and/or outside activities, an Entity Disclosure Information section will appear in the menu bar

Select the +Add icon to open the Entity Disclosure Smartform



- 7. Complete Entity Disclosure Information
 - > **Question 1:** Select an Entity from the search or by entering the name
 - > **Question 2:** Select relation to discloser

7 777		
	ose	Add Disclosure
E 🔁 Validate 🐴 Compare 🔍	Editing: DP0000	Entity Disclosure Information
Instructions and Policies		✓ General Information
Entity Disclosure	Entity Disclosure In	1. Entity:
Information	1. * Do you have any financ	Use the wildcard "%" in front of your search words(s) to widen search results. For example: %NIH
Complete Disclosure Profile	Yes () No <u>Clear</u>	
	2. Entity disclosures:	
	+ Add	ui
	Entity Foreign Entity? Pub There are no items to displ	[None]
		2. * Relation to discloser: 2
		Spouse
		Dependent Child

- > **Question 3:** Select disclosure type
 - o Based on the disclosure type selected, a series of questions related to the type will appear
 - Select **OK** to return to **Entity Disclosure Information**
 - Once you have completed adding entities, select Continue

7.777			8
	ose	2. * Relation to discloser:	
Instructions and Policies	Editing: DP0000216	Spouse Dependent Child	
Forther Directory	Entity Disclosure In	3. * Disclosure types:	
Information		Name Description	
Complete Disclosure	• Yes () No Clear	Equity Stock, Stock Options, or Ownership Interest	
Profile	2. Entity disclosures:	Consulting or Other Professional Services Advisory, scientific advisory board, or expert witness services	
	+ Add	Intellectual Property Rights Royalties paid directly to individual from a non-UF entity in excess of \$5,000 over 12 months	
	Entity	Divestiture and Cash Pay-out Sale of equity	
	DUP National	Sponsored or Reimbursed Travel and on behalf of the Investigator or reimbursed to the Investigator by a non-UF entity in excess of \$5,000 over 12 months	
		Board Service Board of Directors, Board of Trustees	
	Update ABC inc test	Outside Employment Employment external to UF	
		Other Appointments Compensated or uncompensated (e.g. positions, appointments, fellowships, or talent programs).	
		Awards of cash exceeding \$5,000 given to winners of competitions including challenge prizes requiring the attainment of specific material, technology translation, or commercialization goals. See Policy 1-003 for a full definition.	
		* Required OK OK and Add Another O	Cancel

- 8. To submit your disclosure, you must select Complete Disclosure Profile
 - > "The following has occurred" message will provide details on status and actions taken for your disclosure profile

Example of the type of message you may receive



OK

Cancel

- 9. You will see a POP UP WINDOW with the message:
 - > By completing your disclosure profile update you are verifying:
 - 1. All disclosure information is accurate and current.
 - 2. You are <u>not</u> participating in a Malign Foreign Talent Recruitment Program (MFTRP).

10. Select **OK** to confirm and return to the **COI** workspace

Researchers: If you are listed on a UFIRST or IRB research project, see page 12 "For Researchers..." to complete your disclosure profile after this step

Complete Disclosure Profile Update

By completing your disclosure profile update you are verifying:

- 1. All disclosure information is accurate and current.
- 2. You are not participating in a Malign Foreign Talent Recruitment Program (MFTRP).

For more information on what constitutes an MFTRP visit the RISC website.

* End of Complete an Initial Disclosure Profile

Status of disclosure profile is now **No Action Required** > *No actions need to be taken at this time*

Example of Disclosure Profile with Disclosable Interests

Dashboard	COI								
Disclosures Requests	Certifications	Plans 1	Triggering Events	Reports	Meetings	Help Center			
COI > Disclosures > Disclosure Profile	e for								😮 Help
No Action Required	Disclosure P	rofile for							
Disclosure profile last			Inst	ruction Center					
completed: 5/19/2025	leted: Action Required Reason 025 No actions need to be taken at this time Discloser's disclosure profile is up-to-date and requires no action								
Request Pre-Approva	Edit Disclosure P	rofile							
	Management Plan		Status	s La	st Accepted Date			Plan Monitors	
	There are no items to d	isplay							
	Disclosures Pr	e-Approval Requests	Training	History					
	Entity		Forei Entity	gn Publich /? Traded	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
	view DUP National Ins	titute of Standards ar	nd Technology No	No	Self	Equity Board Service	\$2,600,000.0	0020	5/19/2025
	view 1Florida Alzheime	rs Disease Research	Center No	No	Self	Equity	\$15,000.00	N/A	5/19/2025

For Researchers: Disclosure Profile Update in Research Category

- 1. Start by completing or updating your Disclosure Profile on page 2 and follow Steps 1-10 to "Complete an Initial Disclosure Profile"
- 2. When you select "Complete Disclosure Profile," a POP UP WINDOW will show any open research triggers
 - > Select the "Update" icon next to a listed research project to edit the research trigger
 - > Add any relevant details in the Related context text box, then select OK to confirm and return to your Disclosure Profile page
 - > Note: You may select only the research project(s) which require an update at the time of disclosure

Complete Disclosure Profile Update	
By completing your disclosure profile update you are verifying that all disclosure	Edit Research Trigger
1. Open research triggers: 😧 Research Project	Research project:
C Update	Event type: IRB Submission
C Uniste	Start date:
	End date:
	Related organizations:
	1. Related context: •
	* Required OK Cancel

End of Disclosure Profile Update in Research Category

Status of disclosure profile is now No Action Required > No actions need to be taken at this time

Example of Disclosure Profile with Disclosable Interests



Complete a Pre Approval Request (PAR)

1. Create a request by going to the COI workspace and select Request Pre Approval



- 2. A new page will open to create a **Pre Approval Request**:
 - > **Question 1**: Requestor's name is prefilled
 - > Question 2: Type in a name or title for the request, for example "Your Name Type of Activity Entity's Name"
 - > Question 3: Select type of request from category names

3. Select Continue

Request	Creating New: Pre-A	Approval Request Go to forms menu 3 Help
Information	1. Requestor:	
	2. * Request name/title: 👔	
	3. * Type of request: 🚱	
	Name	Description
		Provision of professional expertise to an outside entity in a consulting or other professional services capacity. Submit ONLY IF one or more of the following criteria is met. Otherwise, prior approval is not required.
	Consulting Activity, O Professional Services or Outside Employment	 You will use UF resources more than incrementally, The entity does business with UF, and/or Your Outside Activity will involve UF staff or students that are under your supervision, advisement and/or leadership. An entity rejects the UF-provided consulting rider (available at coi.ufl.edu) and will not remove IP terms from your prospective consulting/employment/services agreement.
	O Textbooks and Classroom Works	Textbooks and Classroom Works ONLY IF you are assigning the materials to your students. Otherwise, prior approval is not required.
		Serving as a witness or reviewing documents for a legal matter.
	O Expert Witness	A PAR is required ONLY IF the legal matter meet one or both of the two criteria below. Otherwise, prior approval is not required.
	0	 For clinical and/or medical matters (regardless of whether the expert witness topic relates to your Institutional Responsibilities) If UF its employees or board members (in the course and scope of their university positions), its Direct Support Organizations (DSOs) or its affiliates are a party to the legal proceeding
	O Public Office / Candidate	Public Office / Candidate
	O Innovation Inducement Pri	Awards of cash exceeding \$5,000 given to winners of competitions including challenge prizes rectranslation, or commercialization goals. A PAR is required ONLY IF the award is pursued as an or See Policy 1-003 for a full definition of Innovation Inducement Prize.

- 4. An Activity Information section will appear on the left side of the screen
 - > Complete all questions on the right side for the activity and select Continue

Example below for Consulting Activity and other Professional Services Information

E Validate Compare «	Editing: PAR000000	Go to forms menu Print	Help
Activity Information	Consulting Activity and other Professional Services Information		
Submit Request	 1. * Entity: ? or If you cannot find the entity in the above list, enter the details here: ? [None] 2. * Describe the proposed activity: ? 		
	3. * Start date: 😧		
	4. End date: 😧		

- 5. A **Submit Request** section will appear on the left side of the screen
 - Select Submit to submit your Pre Approval Request
 - Then select Continue

	ose		Hello,	
Request Information	Editing: PAR000000	Go to for to	orms menu 🔒 Print	▼ 🝞 Help
Activity Information	Submit Pre-Approval Request	4		
Submit Request	Click the Submit button to submit your request for pre-approval.			
		•		
		😢 Exit	Save	Finish

- 6. You will see a POP UP Window with the message: *I certify that the information provided in this Pre-Approval Request is complete and accurate.*
 - Select OK to submit

Submit	
I certify that the information provided in this Pre-Approval Request is complete and accurate.	
	OK Cancel

End of Complete a Pre Approval Request

Your Pre Approval Request is now Under Review with the assigned level 1 intermediate reviewer/supervisor



Respond to a Clarification Request

- 1. If you receive a **Clarifications Requested** action, it will appear in your **COI** workspace under the **History** tab
- 2. Select the Activity title "Clarifications Requested" to review the comment
- 3. Select Submit Response from left tab of workspace

	Dashb	oard	COI						
	Disclosures	Requests	Certifications	Plans	Triggering Events	Reports	Meetings	Help Center	
COI	> Disclosures > Di	sclosure Profile f	for > M.	- textbooks					6 H
	Clarificatio Requeste	ns d	PAR000000 : Request type: Textbooks and Classro		M - textbooks		Discloser:		
Dat 5/10 Dat 5/1	te created: 8/2025 11:06 AM te submitted: 8/2025		Assigned reviewer: Current review stage: Review stage: 1 of 2	Supervisor			Discloser's	employer: UNIVERSITY OF FLORIDA	
Ne	ext Steps	(Pre-Submission	Review	Review Com	plete			
	Edit Pre-Approval R	equest		Clarificat	ion				
` >>	Submit Response			Request	Requested				
$\mathbf{V} \circ$	Add Comment	_							
ළු	Copy Request		History Review	Information					
			Filter by 3 Activi	ity 🔻	Enter text to search		۹ + Add F	ilter 🗙 Clear All	\$
			Activity				Author	▼ Activity Date	
			Clarifications R	Requested			From Reviewe	5/18/2025	
			Requesting clarification	n on disclosure	7		I TOTILI NEVIGWE		
				Domunant Curbonit	tod			E140/000E	

- 4. A POP UP window will appear as shown below
- 5. Type in the **Comments** text box
- 6. Select **OK** to submit the clarification request

Clarification request: Requesting clarification on disclosure Supporting documents: There are no litems to display 1. Comments: Responding to your clarification Responding to your clarification 2. Supporting documents: + Add
Supporting documents: There are no items to display 1. Comments: Responding to your clarification Responding to your clarification 2. Supporting documents: + Add
1. Comments: ? Responding to your clarification . Supporting documents: ? + Add
Responding to your clarification 2. Supporting documents:
Name Description
There are no items to display

End of Responding to a Clarification Request

In the COI workspace, the History will note the activity as "Response Submitted"

Request Clarification

- 1. Select **Request Clarifications** from left tab of workspace
- 2. A POP UP window will appear as shown below to add your comment or supporting document

Request Clarifications		
1. Comments: 😮		
2. Supporting docume	nts: 😧	
+ Add	Description	
There are no items to	display	
		OK Cancel

- 3. Type in the $\ensuremath{\textbf{Comments}}$ text box
- 4. Select **OK** to submit your clarification request.

Request Clarifications		
1. Comments: 😧		
Requesting clarification	on disclosure	
2. Supporting docume	ents: 💡	
+ Add		
Name	Description	
There are no items to	display	
		•
		OK Cancel

End of Request Clarification

In the COI workspace, the History will note the activity as "Clarifications Requested"