



Discloser Quick Start Guide

October 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

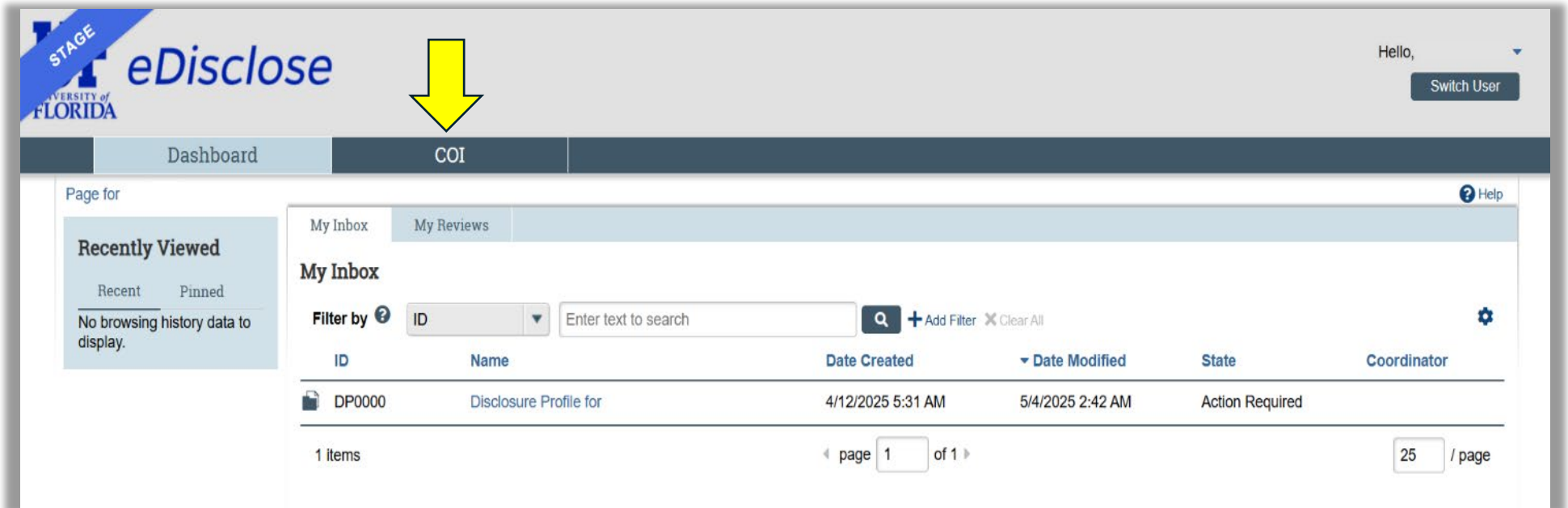
352-392-9174

uf-coi@ufl.edu

<https://coi.ufl.edu>

Complete an Initial Disclosure Profile

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



The screenshot shows the eDisclose COI workspace dashboard. The top navigation bar includes the University of Florida logo, the eDisclose logo, and a yellow arrow pointing to the 'COI' tab. The 'Dashboard' tab is also visible. The main content area is divided into a left sidebar and a main panel. The sidebar contains a 'Recently Viewed' section with 'Recent' and 'Pinned' tabs, and a message: 'No browsing history data to display.' The main panel has tabs for 'My Inbox' and 'My Reviews'. The 'My Inbox' tab is active, showing a table of disclosure profiles. The table has columns for ID, Name, Date Created, Date Modified, State, and Coordinator. One item is listed: ID DP0000, Name Disclosure Profile for, Date Created 4/12/2025 5:31 AM, Date Modified 5/4/2025 2:42 AM, State Action Required, and Coordinator. The bottom of the main panel shows '1 items', 'page 1 of 1', and '25 / page'.

STAGE
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eDisclose

Hello, Switch User

Dashboard COI

Page for Help

My Inbox My Reviews

My Inbox

Filter by ? ID ▼ Enter text to search Q + Add Filter × Clear All ⚙

ID	Name	Date Created	Date Modified	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

The screenshot shows the eDisclose web application interface. At the top, there is a header with the University of Florida logo and the text "eDisclose". Below the header is a navigation bar with tabs: Dashboard, COI, Disclosures, Requests, Certifications, Plans, Triggering Events, Reports, Meetings, and Help Center. The "COI" tab is selected, and the "Disclosures" sub-tab is active, showing the "Disclosure Profile for" page. On the left side, there is a sidebar with a yellow "Action Required" button, a "Request Pre-Approval" button, and a checked checkbox labeled "Complete Disclosure Profile Update". The main content area is titled "Disclosure Profile for" and contains an "Instruction Center" table. The table has two columns: "Action Required" and "Reason". The "Action Required" column lists three steps: 1. Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the **Complete Disclosure Profile Update** button. Go to the Instructions and Policies page to review training and education materials. Check the box to certify that the materials have been accepted. 2. Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the **Complete Disclosure Profile Update** button. 3. Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the **Complete Disclosure Profile Update** button. The "Reason" column lists three reasons: 1. The disclosure profile is new and has never been completed. 2. Discloser's training is out of date. 3. A category associated with the discloser requires renewal. 4. Discloser was added to a research project. Below the table, there is a yellow arrow pointing to a button labeled "Edit Disclosure Profile". At the bottom of the page, there is a footer with a message: "You have not disclosed any interests. Reference the Instruction Center to take the appropriate steps of completing a disclosure update."

STAGE
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eDisclose

Hello, ▾

Dashboard COI Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile for ? Help

Action Required

Request Pre-Approval

☒ Complete Disclosure Profile Update

Disclosure Profile for

Instruction Center	
Action Required	Reason
Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button. Go to the Instructions and Policies page to review training and education materials. Check the box to certify that the materials have been accepted.	The disclosure profile is new and has never been completed
Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.	Discloser's training is out of date
Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.	A category associated with the discloser requires renewal
Review disclosure information in the disclosure profile. When all disclosure information is current and accurate, click on the Complete Disclosure Profile Update button.	Discloser was added to a research project

Edit Disclosure Profile

Disclosures Training History

i You have not disclosed any interests. Reference the Instruction Center to take the appropriate steps of completing a disclosure update.

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** to proceed

Validate
Compare
<<

Instructions and Policies
Entity Disclosure Information
Complete Disclosure Profile

Editing: DP0000
Go to forms menu
Print
Help



Instructions and Policies

Training and Education


The following steps must be completed. If you have any questions as you are using the system, contact: uf-coi@ufl.edu

- Complete the training provided in the documents below.
- Report Disclosable Interests within 30 days of acquiring or discovering the interest by adding the interest to your Disclosure Profile.
- Certify your disclosure annually.
- Even if you have no Disclosable Interests, you still need to complete the annual disclosure.
- Provide any additional information requested as your Disclosure Profile is reviewed.
- For researchers, if a Research COI Management Plan is required, your agreement to the plan must be documented before related funding may be released. If a Management Plan is in place, you are responsible for all its terms, conditions, and actions.
- If you obtain federal funding from the Department of Energy (DOE), the following certification statement is required: *I understand that this Disclosure is required to obtain funding from the U.S. Government. I certify to the best of my knowledge and belief that the information contained in this Disclosure Statement is true, complete, and accurate. I understand that any false, fictitious, or fraudulent information, misrepresentations, half-truths, or omissions of any material fact, may subject me to criminal, civil or administrative penalties for fraud, false statements, false claims, or otherwise. (18 U.S.C. §§ 1001 and 267, and 31 U.S.C. 3729-3730 and 3801-3812). I further understand and agree that (1) the statements and representations made herein are material to U.S. Government's funding decision, and (2) I have a responsibility to update the disclosures during the period of performance of the award should circumstances change which impact the responses provided above.*

Training documents:

 [eDisclose Certification Page_COI Training\(0.02\)](#) 

Date that you completed your COI Training:

1. * I certify that I have read and understood the education materials presented to me:  ☐

Exit
Save
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**

The screenshot displays the UF eDisclose web application interface. The header includes the UF eDisclose logo and a user greeting "Hello, [user name]". The left sidebar contains navigation links: "Instructions and Policies", "Entity Disclosure Information" (highlighted in orange), and "Complete Disclosure Profile". The main content area is titled "Editing: DP000" and "Entity Disclosure Information". It features a question: "1. * Do you have any financial interests and/or outside activities?" with radio buttons for "Yes" and "No" (the "No" button is selected), and a "Clear" link. A yellow arrow points to the "No" radio button. At the bottom right, there are three buttons: "Exit", "Save", and "Continue" (highlighted in dark blue with a right arrow). A yellow arrow points to the "Continue" button.

UF eDisclose

UNIVERSITY of FLORIDA

Hello, [user name]

Validate Compare

Instructions and Policies

Entity Disclosure Information

Complete Disclosure Profile

Editing: DP000

Go to forms menu Print Help

Entity Disclosure Information

1. * Do you have any financial interests and/or outside activities? ?

☐ Yes ☒ No [Clear](#)

Exit Save Continue

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

The screenshot shows the UF eDisclose web application interface. The top header includes the UF logo and 'eDisclose' text, along with a user greeting 'Hello,'. The left sidebar contains navigation links: 'Instructions and Policies', 'Entity Disclosure Information' (highlighted in orange), and 'Complete Disclosure Profile'. The main content area is titled 'Editing: DP0000' and 'Entity Disclosure Information'. It contains two sections: '1. * Do you have any financial interests and/or outside activities?' with radio buttons for 'Yes' (selected) and 'No', and a 'Clear' link; and '2. Entity disclosures:' with a '+ Add' button. A yellow arrow points to the '+ Add' button. Below the button is a table with columns: 'Entity', 'Foreign Entity?', 'Publicly Traded?', 'Relation to Discloser', 'Disclosure Types', 'Total Value', 'Total Time Commitment (Days)', and 'Last Modified'. The table currently displays 'There are no items to display'. At the bottom right, there are buttons for 'Exit', 'Save', and 'Continue'.

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
There are no items to display							

7. Complete **Entity Disclosure Information**

- **Question 1:** Select an Entity from the search or by entering the name
- **Question 2:** Select relation to discloser

The screenshot shows the 'UF eDisclose' web application interface. On the left is a sidebar with the 'Entity Disclosure Information' menu item highlighted. The main content area is titled 'Add Disclosure' and 'Entity Disclosure Information'. It shows a form for editing a disclosure with ID 'DP0000'. The form has two main sections: '1. * Do you have any financial interest in any entity?' with radio buttons for 'Yes' (selected) and 'No', and a 'Clear' link; and '2. Entity disclosures:' with an '+ Add' button and a table with columns 'Entity', 'Foreign Entity?', and 'Public'. The table is currently empty. Below the table is a section for '1. Entity:' with a search input field and a dropdown menu, and a section for '2. * Relation to discloser:' with radio buttons for 'Self', 'Spouse', and 'Dependent Child'.

UF eDisclose
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Validate Compare

Instructions and Policies

Entity Disclosure Information

Complete Disclosure Profile

Editing: DP0000

Entity Disclosure Information

1. * Do you have any financial interest in any entity?

☒ Yes ☐ No [Clear](#)

2. Entity disclosures:

[+ Add](#)

Entity	Foreign Entity?	Public
There are no items to display		

Add Disclosure

Entity Disclosure Information

General Information

1. Entity:

Use the wildcard "%" in front of your search words(s) to widen search results. For example: %NIH

[?](#) [...](#)

or

If you cannot find the entity in the above list, enter the details here:

[None] [...](#)

2. * Relation to discloser: [?](#)

☐ Self

☐ Spouse

☐ Dependent Child

➤ **Question 3:** Select disclosure type

- 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**

UF eDisclose
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Validate Compare

Instructions and Policies

Entity Disclosure Information

Complete Disclosure Profile

Editing: DP00002162

Entity Disclosure Information

1. * Do you have any financial interests?
☒ Yes ☐ No [Clear](#)

2. Entity disclosures:

+ Add

Entity

Update DUP National

Update ABC inc test

2. * Relation to discloser: ?

☐ Self
☐ Spouse
☐ Dependent Child

3. * Disclosure types:

Name	Description
<input type="checkbox"/> Equity	Stock, Stock Options, or Ownership Interest
<input type="checkbox"/> Consulting or Other Professional Services	Advisory, scientific advisory board, or expert witness services
<input type="checkbox"/> Intellectual Property Rights	Royalties paid directly to individual from a non-UF entity in excess of \$5,000 over 12 months
<input type="checkbox"/> Divestiture and Cash Pay-out	Sale of equity
<input type="checkbox"/> Sponsored or Reimbursed Travel	Travel paid on behalf of the Investigator or reimbursed to the Investigator by a non-UF entity in excess of \$5,000 over 12 months
<input type="checkbox"/> Board Service	Board of Directors, Board of Trustees
<input type="checkbox"/> Outside Employment	Employment external to UF
<input type="checkbox"/> Other Appointments	Compensated or uncompensated (e.g. positions, appointments, fellowships, or talent programs).
<input type="checkbox"/> Innovation Inducement Prizes	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 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

UF eDisclose

UNIVERSITY of FLORIDA

Hello, .

Validate Compare

Instructions and Policies

Entity Disclosure Information

Complete Disclosure Profile

Editing: DP0000

Go to forms menu Print Help

Complete Disclosure Profile

The following has occurred:

- The disclosure profile is new and has never been completed
- Discloser was added to a research project
- A category associated with the discloser requires renewal

Next Steps:

1. Click the Complete Disclosure Profile Update button below after all necessary updates have been made to the Disclosure Profile.

Complete Disclosure Profile Update

Exit Save Return without updating

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 not 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](#).



OKCancel

❖ 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

The screenshot displays the 'Disclosure Profile for' page in a web application. The top navigation bar includes 'Dashboard', 'COI', and various sub-sections like 'Disclosures', 'Requests', 'Certifications', etc. The main content area shows a status of 'No Action Required' with a message that the disclosure profile was last completed on 5/19/2025. Below this, there is an 'Instruction Center' box stating that no actions are required because the profile is up-to-date. A 'Management Plan' section indicates there are no items to display. At the bottom, a table titled 'Disclosures' lists two entities with their respective details.

No Action Required
Disclosure profile last completed: 5/19/2025
[Request Pre-Approval](#)

Disclosure Profile for

Instruction Center	
Action Required No actions need to be taken at this time	Reason Discloser's disclosure profile is up-to-date and requires no action

[Edit Disclosure Profile](#)

Management Plan	Status	Last Accepted Date	Plan Monitors
There are no items to display			

Disclosures								
Pre-Approval Requests								
Training								
History								
Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified	
View DUP National Institute of Standards and Technology	No	No	Self	Equity Board Service	\$2,600,000.00	20	5/19/2025	
View 1Florida Alzheimers 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

The screenshot displays two overlapping windows. The background window, titled 'Complete Disclosure Profile Update', contains a list of research projects under the heading '1. Open research triggers:'. A yellow arrow points to the 'Update' button next to a project. The foreground window, titled 'Edit Research Trigger', contains the following fields: 'Research project:', 'Event type: IRB Submission', 'Start date:', 'End date:', and 'Related organizations:'. Under 'Related organizations:', there is a sub-heading '1. Related context:' followed by a yellow-outlined text box. A yellow arrow points to the 'OK' button at the bottom right of the foreground window. A legend at the bottom left of the foreground window indicates '* Required'.

❖ 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*

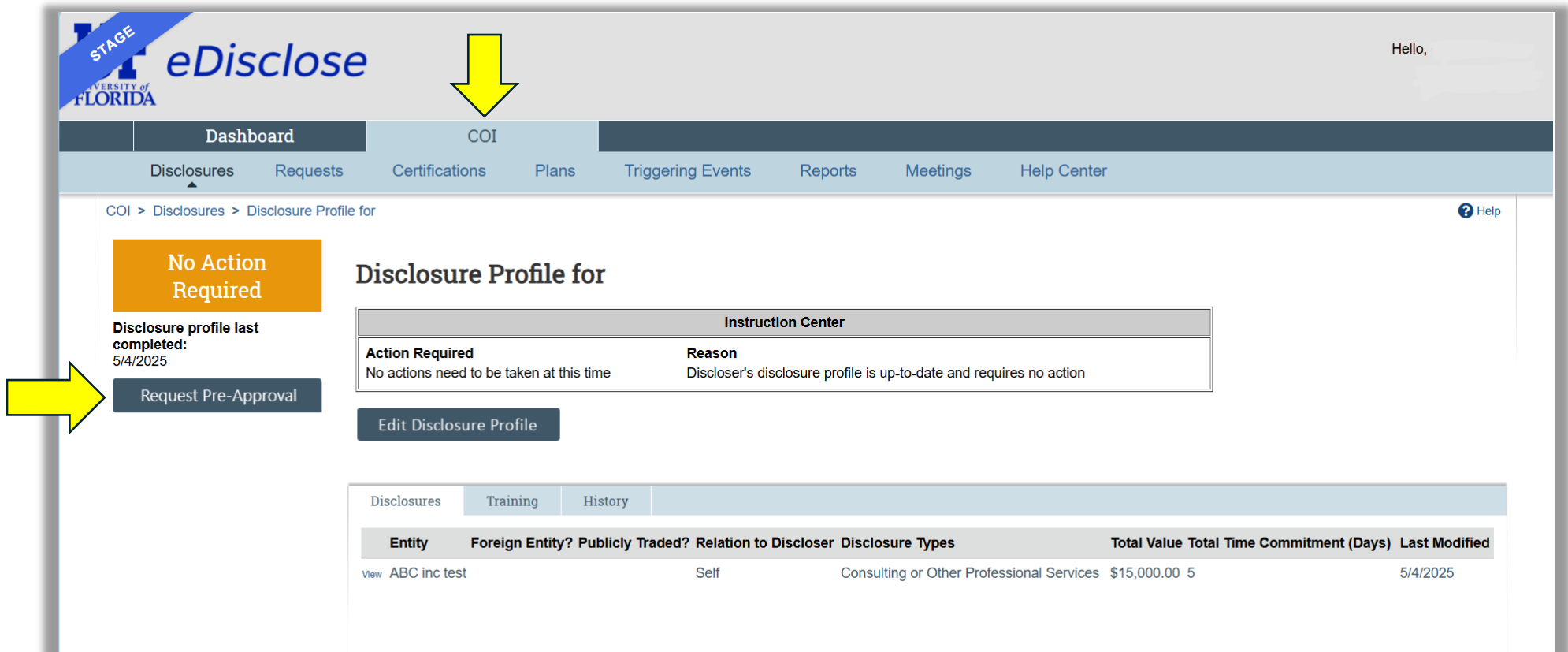
Example of Disclosure Profile with Disclosable Interests

The screenshot displays the 'Disclosure Profile for' page in the COI system. The top navigation bar includes 'Dashboard', 'COI', 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The breadcrumb trail shows 'COI > Disclosures > Disclosure Profile for'. A yellow box on the left indicates 'No Action Required' with the text 'Disclosure profile last completed: 5/19/2025' and a 'Request Pre-Approval' button. The main content area shows the 'Disclosure Profile for' title, an 'Instruction Center' box with 'Action Required' and 'Reason' details, an 'Edit Disclosure Profile' button, and a 'Management Plan' section stating 'There are no items to display'. Below this is a table of disclosable interests with columns for Entity, Foreign Entity?, Publicly Traded?, Relation to Discloser, Disclosure Types, Total Value, Total Time Commitment (Days), and Last Modified.

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
View DUP National Institute of Standards and Technology	No	No	Self	Equity Board Service	\$2,600,000.00	20	5/19/2025
View 1Florida Alzheimers Disease Research Center	No	No	Self	Equity	\$15,000.00	N/A	5/19/2025

Complete a Pre Approval Request (PAR)

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



The screenshot shows the eDisclose interface for the COI workspace. A yellow arrow points to the 'Request Pre-Approval' button in the left sidebar. Another yellow arrow points to the 'COI' tab in the top navigation bar.

STAGE UNIVERSITY of FLORIDA eDisclose

Hello,

Navigation: Dashboard | **COI** | Disclosures | Requests | Certifications | Plans | Triggering Events | Reports | Meetings | Help Center

COI > Disclosures > Disclosure Profile for

No Action Required

Disclosure profile last completed: 5/4/2025

Request Pre-Approval

Disclosure Profile for

Instruction Center

Action Required	Reason
No actions need to be taken at this time	Discloser's disclosure profile is up-to-date and requires no action

Edit Disclosure Profile

Disclosures | Training | History

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Last Modified
View ABC inc test			Self	Consulting or Other Professional Services	\$15,000.00	5	5/4/2025

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**

Creating New: Pre-Approval Request Go to forms menu Help

1. Requestor:

2. * Request name/title:

3. * Type of request: ?

Name	Description
<input type="radio"/> Consulting Activity, Professional Services or Outside Employment	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. 1. You will use UF resources more than incrementally, 2. The entity does business with UF, and/or 3. Your Outside Activity will involve UF staff or students that are under your supervision, advisement and/or leadership. 4. An entity rejects the UF-provided consulting rider (available at col.ufl.edu) and will not remove IP terms from your prospective consulting/employment/services agreement.
<input type="radio"/> Textbooks and Classroom Works	Textbooks and Classroom Works ONLY IF you are assigning the materials to your students. Otherwise, prior approval is not required.
<input type="radio"/> Expert Witness	Serving as a witness or reviewing documents for a legal matter. A PAR is required ONLY IF the legal matter meet one or both of the two criteria below. Otherwise, prior approval is not required. 1. For clinical and/or medical matters (regardless of whether the expert witness topic relates to your Institutional Responsibilities) 2. 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
<input type="radio"/> Public Office / Candidate	Public Office / Candidate
<input type="radio"/> Innovation Inducement Prize	Awards of cash exceeding \$5,000 given to winners of competitions including challenge prizes rec translation, 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.

Exit Save Continue

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*

The screenshot shows a web application interface. On the left is a sidebar with a menu containing 'Request Information', 'Activity Information' (highlighted in orange), and 'Submit Request'. The main content area is titled 'Editing: PAR0000000' and 'Consulting Activity and other Professional Services Information'. It contains four numbered, required fields: 1. 'Entity' with a dropdown menu and a help icon; 2. 'Describe the proposed activity' with a large text area and a help icon; 3. 'Start date' with a date picker and a help icon; 4. 'End date' with a date picker and a help icon. The top right of the form has links for 'Go to forms menu', 'Print', and 'Help'.

Editing: PAR0000000

Go to forms menu Print Help

Request Information

Activity 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 **OK** to the attestation

The screenshot shows the 'UF eDisclose' interface. On the left is a sidebar with a menu containing 'Request Information', 'Activity Information', and 'Submit Request' (which is highlighted in orange). The main content area is titled 'Editing: PAR00000' and 'Submit Pre-Approval Request'. Below the title, it says 'Click the Submit button to submit your request for pre-approval.' and features a dark grey 'Submit' button. A large yellow arrow points to this button. At the top right of the main area, there are links for 'Go to forms menu', 'Print', and 'Help'. At the bottom right, there is a footer bar with three buttons: 'Exit', 'Save', and 'Return without submitting'.

UF eDisclose

UNIVERSITY of FLORIDA

Hello,

Validate Compare

Request Information

Activity Information

Submit Request

Editing: PAR00000

Go to forms menu Print Help

Submit Pre-Approval Request

Click the Submit button to submit your request for pre-approval.

Submit

Exit Save Return without submitting

6. You will see a [POP UP Window](#) for the attestation
- Review and select **OK** to submit the Pre Approval Request form

Submit

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

For civil personal lawsuit expert testimony (for the plaintiff or defendant) involving a personal dispute between a person and a healthcare provider, I have confirmed with the entity retaining my expert services that the health care at issue was not provided by another UF Health provider. Additionally, I am not aware that this matter involves essential UF Health affiliates who accept trainees in support of UF Health's educational research and service mission. Should an affiliate relationship be discovered, I may be asked to withdraw from the case. I affirm that the entity or individual with whom I will be working understands that my engagement in this activity is in my capacity as a private citizen and not as an employee of the University of Florida.

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

Dashboard

COI

Disclosures

Requests

Certifications

Plans

Triggering Events

Reports

Meetings

Help Center

COI > Disclosures > Disclosure Profile for > First, Last-Consulting- ABC Co.

Under Review

Date created:
5/4/2025

Date submitted:
5/4/2025

Request type: Consulting Activity and other Professional Services

Assigned reviewer:

Current review stage: Supervisor

Review stage: 1 of 2

Discloser:

Discloser's employer: UNIVERSITY OF FLORIDA

Next Steps

View Pre-Approval Request

Add Comment

Copy Request

Pre-Submission

Review

Review Complete

Clarification Requested

History

Review Information

Filter by ⓘ

Activity

Enter text to search

Q

+ Add Filter

✕ Clear All

⚙

Activity

Author

Activity Date

Pre-Approval Request Submitted

5/4/2025 10:01

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

The screenshot displays the COI workspace interface. The top navigation bar includes 'Dashboard', 'COI', 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The breadcrumb trail shows 'COI > Disclosures > Disclosure Profile for > M - textbooks'. The main header area displays 'PAR000000 : M - textbooks' and details: 'Request type: Textbooks and Classroom Works', 'Assigned reviewer:', 'Current review stage: Supervisor', and 'Review stage: 1 of 2'. A flowchart shows the process: Pre-Submission → Review → Review Complete, with a 'Clarification Requested' step branching from 'Review'. The 'Discloser' is 'UNIVERSITY OF FLORIDA'. On the left, the 'Next Steps' section includes 'Edit Pre-Approval Request', 'Submit Response' (highlighted with a yellow arrow), 'Add Comment', and 'Copy Request'. The 'History' tab is active, showing a table with columns 'Activity', 'Author', and 'Activity Date'. The table lists 'Clarifications Requested' (highlighted with a yellow arrow) and 'Pre-Approval Request Submitted'. The 'Author' for 'Clarifications Requested' is 'From Reviewer'.

Clarifications Requested

Date created: 5/18/2025 11:06 AM
Date submitted: 5/18/2025

Next Steps

- Edit Pre-Approval Request
- Submit Response
- Add Comment
- Copy Request

PAR000000 : M - textbooks

Request type: Textbooks and Classroom Works
Assigned reviewer:
Current review stage: Supervisor
Review stage: 1 of 2

Discloser:
Discloser's employer: UNIVERSITY OF FLORIDA

Pre-Submission → Review → Review Complete

Clarification Requested

History

Filter by: Activity

Enter text to search

Activity Author Activity Date

Clarifications Requested	From Reviewer	5/18/2025
Pre-Approval Request Submitted		5/18/2025

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

Submit Response

Clarification request:
Requesting clarification on disclosure

Supporting documents:
There are no items to display

1. Comments: ?

Responding to your clarification

2. Supporting documents: ?

+ Add

Name	Description
There are no items to display	

OK

Cancel

❖ 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 documents: ?

Add

Name	Description
There are no items to display	

OK

Cancel

3. Type in the **Comments** text box
4. Select **OK** to submit your clarification request.

Request Clarifications


1. Comments: ?

Requesting clarification on disclosure

2. Supporting documents: ?

+ Add

Name	Description
There are no items to display	



OKCancel

❖ End of **Request Clarification**

In the COI workspace, the **History** will note the activity as “[Clarifications Requested](#)”