



Reviewer Quick Start Guide

October 2025

Review an Annual Certification

Review a Pre Approval Request (PAR)

**UF RISC Office
Conflicts of Interest Program**

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uf-coi@ufl.edu

<https://coi.ufl.edu>

Review an Annual Certification

1. Go to <https://coi.ufl.edu> to log in to **eDisclose** with your GatorLink credentials
2. From the Dashboard Home Screen, go to your **COI** workspace
3. Select **Certifications** to view the workspace
4. Certifications pending your review will show under “**In Review**” section
 - **Note:** If a discloser has nothing to disclose, no review is required. You can still view the certification under “**All Certifications**”
5. Select a **title** under the **Name** category to open an individual’s **Annual Certification**

STAGE UNIVERSITY of FLORIDA eDisclose Hello, ▾

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

COI > Certifications

Certifications

In Review Awaiting Profile Update Requires Management Plan All Certifications

Filter by ⓘ ID ▾ Enter text to search 🔍 + Add Filter ✕ Clear All ⚙

ID	Name	▼ Date Modified	State	Discloser First Name	Discloser Last Name	Assigned Reviewer	Type	Related Research Project
CERT000	Annual certification for	5/12/2025 1:09 PM	Under Review				Annual	

1 items ◀ page 1 of 1 ▶ 25 / page

6. Status will show as **Under Review** if the discloser reports a **Disclosable Interest**

- Select **Review Certification** to open the **Annual Certification**

The screenshot displays the 'Annual certification for CERT000' page. The top navigation bar includes 'Dashboard', 'COI', 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The breadcrumb trail is 'COI > Certifications > Annual certification for'. A yellow arrow points to the 'Review Certification' button in the 'Next Steps' section.

Under Review

CERT000 : Annual certification for

Certification created date: 4/16/2025 10:23 AM
Profile last submitted date: 5/16/2025
Training expiration date: 5/16/2026

Certification type: Annual
Assigned reviewer: Supervisor
Current review stage: 1 of 1

Discloser:
Discloser's employer: UNIVERSITY OF FLORIDA
Has significant financial interest: Yes

Next Steps

- ☒ Submit Review
- ☐ Request Clarifications
- ☐ Assign Reviewer
- ☐ Manage Ancillary Reviews
- ☐ Add Comment
- ☐ Withdraw

Review Certification

Flowchart:

```
graph LR; A[Awaiting Profile Update] --> B[Review]; B --> C[Review Complete]; B --> D[Clarification Requested]; D --> B;
```

History | **Review Information** | **Snapshots**

Filter by

Activity	Author	Activity Date
Profile Updated		5/16/2025 12:42 PM

7. A new Smartform will open to show the **Disclosure Profile Information** page for your review
- Additional tabs **Entity Disclosure Information** and **Pre-Approval Requests** will appear in the menu bar when a discloser's profile adds a disclosable interest or makes a request for an outside activity

Reviewing: CERT000

Go to forms menu Print Help

Compare current state of version:
0.3 Profile Updated
with
0.2 Certification Created
4/16/2025 10:23:11 AM

Changes found on 2 steps:

Disclosure Profile Information

Entity Disclosure Information

Review the disclosure information provided by the discloser listed below. Compare the disclosure information with the associated research projects to determine if an additional review should be completed for the discloser in relation to one or more of the research projects. When you have completed your review, record your determinations using the Submit Research Portfolio Review activity in the project workspace.

Disclosure Profile Information

- 1. Discloser:**
- 2. Has significant financial interest:**
Yes
- 3. Last submitted date of disclosure profile:**
5/16/2025

modified 6 minutes ago • version 0.3 (Profile Updated)
Old Value:
[None]
- 4. Training expiration date:**
5/16/2026

8. Review each section as applicable: **Disclosure Profile Information, Entity Disclosure Information, and Pre-Approval Requests**
9. Check **“Above section has been reviewed”** after review and the section will highlight green

Compare current state of version:
0.3 Profile Updated
with
0.2 Certification Created
4/16/2025 6:23:56 PM ▼
Changes found on 2 steps:

Disclosure Profile Information

Entity Disclosure Information

Review the disclosure information provided by the discloser listed below. Compare the disclosure information with the associated research projects to determine if an additional review should be completed for the discloser in relation to one or more of the research projects. When you have completed your review, record your determinations using the Submit Research Portfolio Review activity in the project workspace.

Disclosure Profile Information

- 1. Discloser:**
- 2. Has significant financial interest:**
Yes
- 3. Last submitted date of disclosure profile:**
5/18/2025

• modified 9 minutes ago • version 0.3 (Profile Updated)
Old Value:
[None]
- 4. Training expiration date:**
5/18/2026

Above section has been reviewed: ☒

10. Select **EXIT** after your review of each section

Compare current state of version:
0.3 Profile Updated
with
0.2 Certification Created
4/16/2025 6:23:56 PM
Changes found on 2 steps:
Disclosure Profile Information
Entity Disclosure Information

Entity Disclosure Information

Entity Disclosure Information

Go to forms menuPrintHelp

1. Discloser has information to disclose regarding entities:
☒ Yes ☐ No

Old Value:
[None]

hidden → visible

2. Entity disclosures:

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Total Time Commitment (Days)	Date Created	Last Modified
View	No	No	Self	Consulting or Other Professional Services Intellectual Property Rights	\$30,000.00	20	5/18/2025	5/18/2025

Differences

Added:

Above section has been reviewed: ☒

Exit

11. Select **Submit Review** to complete your review

The screenshot shows the 'Annual certification for Jasmeet Kalsi' (CERT000) interface. The top navigation bar includes 'Dashboard', 'COI', 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The left sidebar shows 'Next Steps' with a 'Review Certification' button and a list of actions: 'Submit Review' (checked), 'Request Clarifications', 'Assign Reviewer', 'Manage Ancillary Reviews', 'Add Comment', and 'Withdraw'. A yellow arrow points to 'Submit Review'. The main content area displays certification details: 'Certification type: Annual', 'Assigned reviewer: Supervisor', 'Current review stage: 1 of 1', 'Review stage: 1 of 1', 'Discloser: UNIVERSITY OF FLORIDA', and 'Has significant financial interest: Yes'. A flowchart shows the process: 'Awaiting Profile Update' leads to 'Review' (highlighted in orange), which can lead to 'Review Complete' or 'Clarification Requested' (which loops back to 'Awaiting Profile Update'). The bottom section has tabs for 'History', 'Review Information', and 'Snapshots'. The 'Review Information' tab is active, showing a table with columns 'Activity', 'Author', and 'Activity Date'. The first row shows 'Profile Updated' on '5/18/2025 12:51 PM'.

COI > Certifications > Annual certification for Jasmeet Kalsi

Under Review

CERT000 : Annual certification for

Certification created date: 4/16/2025 6:23 PM
Profile last submitted date: 5/18/2025
Training expiration date: 5/18/2026

Certification type: Annual
Assigned reviewer: Supervisor
Current review stage: 1 of 1
Review stage: 1 of 1

Discloser: UNIVERSITY OF FLORIDA
Discloser's employer: UNIVERSITY OF FLORIDA
Has significant financial interest: Yes

Next Steps

Review Certification

☒ Submit Review
☐ Request Clarifications
☐ Assign Reviewer
☐ Manage Ancillary Reviews
☐ Add Comment
☐ Withdraw

Flowchart:

```
graph LR; A[Awaiting Profile Update] --> B[Review]; B --> C[Review Complete]; B --> D[Clarification Requested]; D --> A;
```

History | **Review Information** | **Snapshots**

Filter by

Activity	Author	Activity Date
Profile Updated		5/18/2025 12:51 PM

12. A **POP UP** window will appear with the following questions:

Question 1: *Does a Disclosable Interest result in a conflict of interest or create an unresolvable conflict of commitment with the discloser's institutional responsibilities?*

Submit Review

i Warning: You may not have marked all certification pages as reviewed, or the disclosure information may have changed since your review. Be sure to review the latest information in the certification SmartForm before submitting your review.

1. * Does a Disclosable Interest result in a conflict of interest or create an unresolvable conflict of commitment with the discloser's institutional responsibilities? ?

☐ Yes ☐ No [Clear](#)

Question 2: If **YES** to **Question 1**, in the **Notes text box**, type your answers to the following prompts:

1. *Identify which Disclosable Interest(s) creates a conflict(s), and*
2. *Describe the conflict(s) of commitment or interest.*

Note: *The COI Program will follow up with the discloser to ensure an end to activity and removal from the Disclosure Profile in conjunction with regulatory requirements.*

2. Notes: If yes above, use the space below to:

1. Identify which Disclosable Interest(s) creates a conflict(s), and
2. Describe the conflict(s) of commitment or interest.

The COI Program will follow up with the discloser to ensure an end to activity and removal from the Disclosure Portfolio in conjunction with regulatory requirements.

3. Supporting documents:

+ Add

Name

There are no items to display

OK

Cancel

❖ End of **Review an Annual Certification**

- Activity: **Review Submitted**
- Review status: **Review Complete**

The screenshot displays the 'COI' (Conflict of Interest) system interface. The top navigation bar includes 'Dashboard', 'COI', 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The breadcrumb trail indicates the path: 'COI > Certifications > Annual certification for'.

Review Complete

CERT00065017: Annual certification for

Certification created date: 4/16/2025 6:23 PM
Determination date: 5/18/2025
Profile last submitted date: 5/18/2025
Training expiration date: 5/18/2026

Certification type: Annual
Determination: Unrelated
Assigned reviewer:

Discloser:
Discloser's employer: UNIVERSITY OF FLORIDA
Has significant financial interest: Yes

Next Steps

[View Certification](#)

[Return for Review](#)
[Assign Reviewer](#)
[Manage Ancillary Reviews](#)
[Add Comment](#)

Activity Flow:

```
graph LR; A[Awaiting Profile Update] --> B[Review]; B --> C[Review Complete]; B --> D[Clarification Requested]; D --> B;
```

History | **Review Information** | **Snapshots**

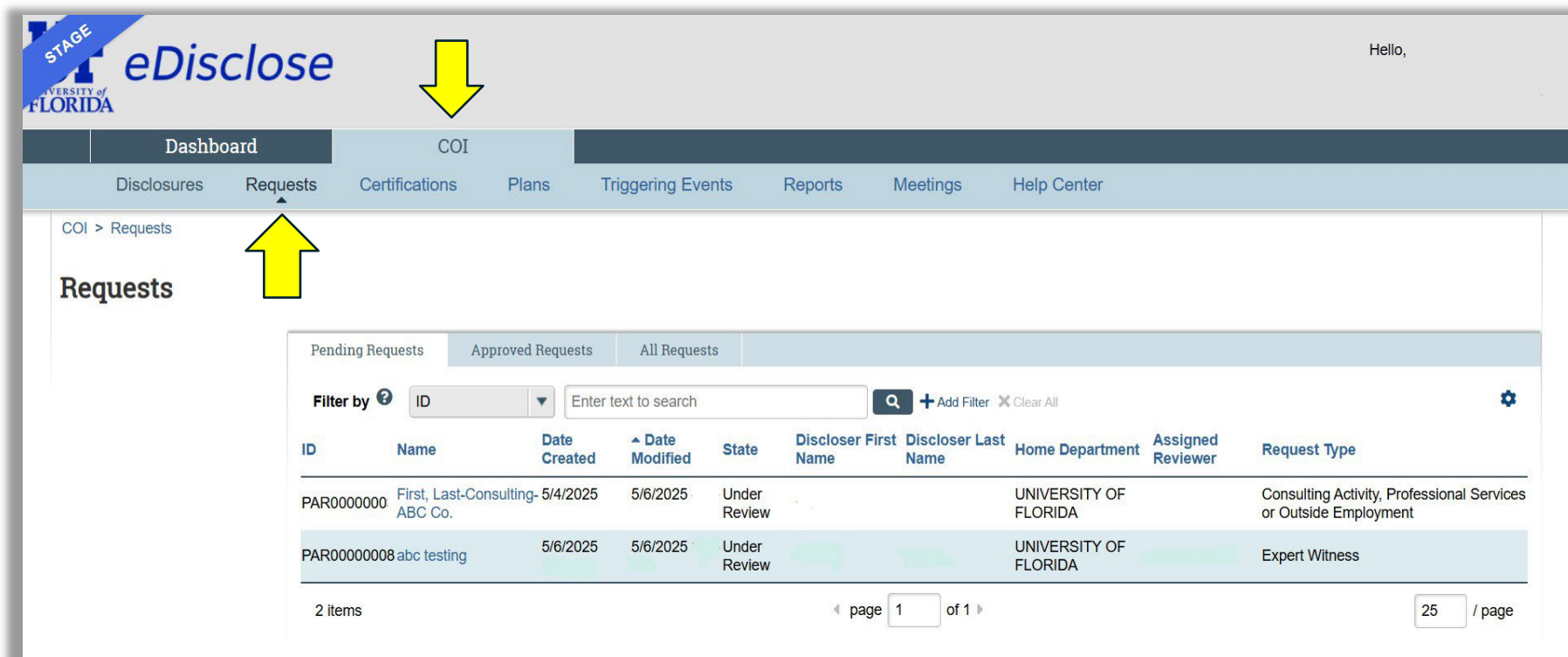
Filter by ? **Activity** ▼ 🔍 + Add Filter ✕ Clear All ⚙️

	Activity	Author	Activity Date
✓	Review Submitted		5/18/2025
i	Profile Updated		5/18/2025

A yellow arrow points to the 'Review Submitted' activity in the history table.

Review a Pre Approval Request (PAR)

1. Go to <https://coi.ufl.edu> to log in to **eDisclose** with your GatorLink credentials
2. From the **Dashboard** Home Screen, go to your **COI** workspace
3. Select **Requests** page to view workspace for *Pending*, *Approved* and *All Requests*



The screenshot shows the eDisclose interface. The top navigation bar includes 'Dashboard', 'COI', and various sub-sections. The 'Requests' tab is highlighted in the top bar and also in the left sidebar. The main content area displays a table of requests under the 'Pending Requests' tab.

ID	Name	Date Created	Date Modified	State	Discloser First Name	Discloser Last Name	Home Department	Assigned Reviewer	Request Type
PAR0000000	First, Last-Consulting-ABC Co.	5/4/2025	5/6/2025	Under Review			UNIVERSITY OF FLORIDA		Consulting Activity, Professional Services or Outside Employment
PAR00000008	abc testing	5/6/2025	5/6/2025	Under Review			UNIVERSITY OF FLORIDA		Expert Witness

2 items

page 1 of 1

25 / page

4. Select a [title](#) under the **Name** category to view the [Pre Approval Request](#)

STAGE

eDisclose

UNIVERSITY of FLORIDA

Hello,

Dashboard

COI

Disclosures

Requests

Certifications

Plans

Triggering Events

Reports

Meetings

Help Center

COI > Requests

Requests

Pending Requests

Approved Requests

All Requests

Filter by ?

ID

Enter text to search

+

Add Filter

×

Clear All

ID	Name	Date Created	Date Modified	State	Discloser First Name	Discloser Last Name	Home Department	Assigned Reviewer	Request Type
PAR0000000	First, Last-Consulting-ABC Co.	5/4/2025	5/6/2025	Under Review			UNIVERSITY OF FLORIDA		Consulting Activity, Professional Services or Outside Employment
PAR00000008	abc testing	5/6/2025	5/6/2025	Under Review			UNIVERSITY OF FLORIDA		Expert Witness

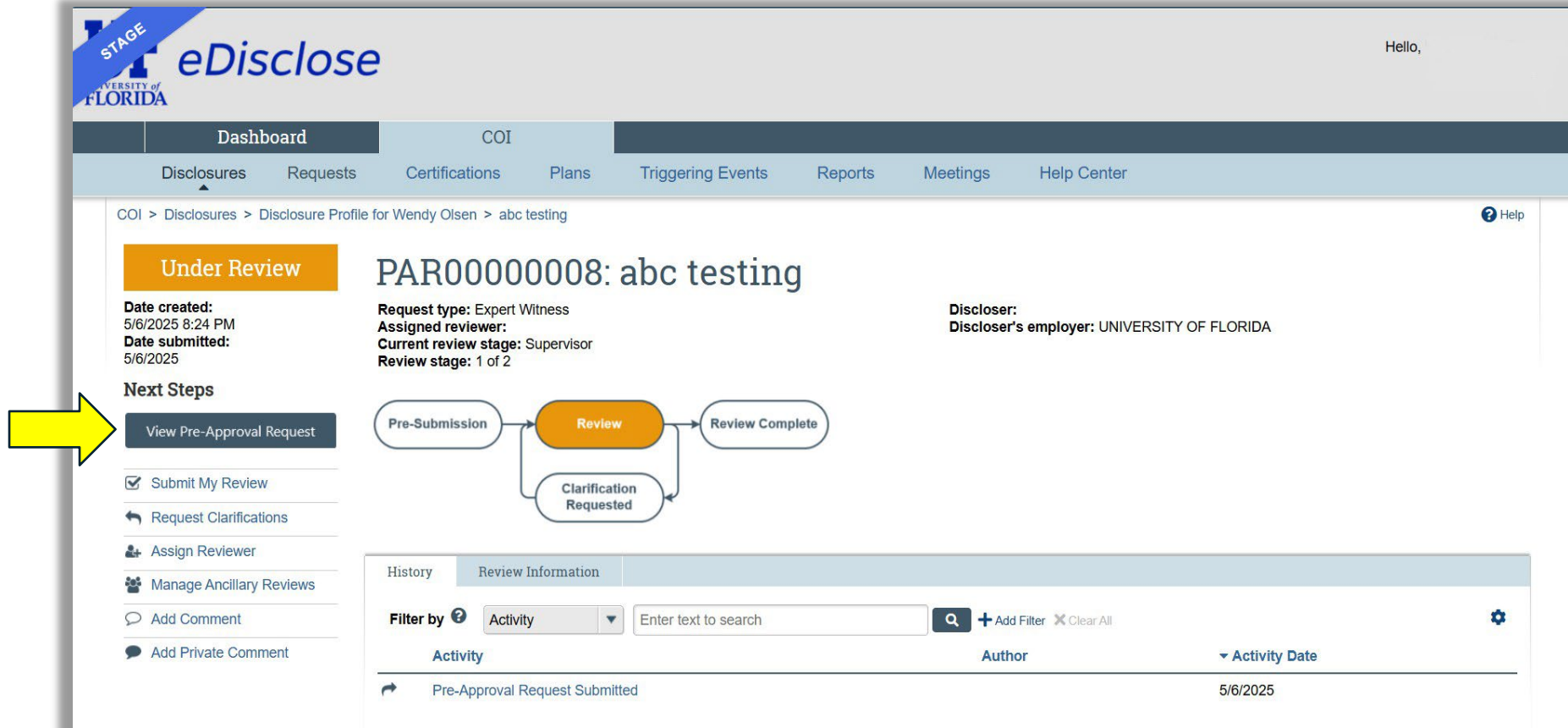
2 Items

◀ page 1 of 1 ▶

25 / page

5. Status of request is **Under Review**

- Select **View Pre-Approval Request (PAR)** to open the request



The screenshot displays the eDisclose interface for a request titled "PAR00000008: abc testing". The status is "Under Review". The interface includes a navigation bar with tabs like Dashboard, COI, Disclosures, Requests, etc. A sidebar on the left lists "Next Steps" with a button "View Pre-Approval Request" highlighted by a yellow arrow. The main content area shows request details, a workflow diagram, and a history table.

Under Review

PAR00000008: abc testing

Date created: 5/6/2025 8:24 PM
Date submitted: 5/6/2025

Request type: Expert Witness
Assigned reviewer: Supervisor
Current review stage: 1 of 2
Review stage: 1 of 2

Discloser:
Discloser's employer: UNIVERSITY OF FLORIDA

Next Steps

- [View Pre-Approval Request](#)
- ☒ Submit My Review
- [Request Clarifications](#)
- [Assign Reviewer](#)
- [Manage Ancillary Reviews](#)
- [Add Comment](#)
- [Add Private Comment](#)

Workflow Diagram:

```

graph LR
    A([Pre-Submission]) --> B([Review])
    B --> C([Review Complete])
    B --> D([Clarification Requested])
    D --> B
  
```

History

Activity	Author	Activity Date
Pre-Approval Request Submitted		5/6/2025

6. Review the open PAR by menu section: **Request Information**

The screenshot shows the 'Request Information' section of the UF eDisclose system. The header includes the UF eDisclose logo and a 'Hello,' greeting. The left sidebar has a 'Compare' button and three menu items: 'Request Information' (highlighted in orange), 'Entity Disclosures', and 'Activity Information'. The main content area is titled 'Reading: PAR0000000' and contains three numbered items:

- 1. Requestor:**
- 2. * Request name/title:** abc testing
- 3. * Type of request:** Expert Witness

At the top right of the main content area, there are links for 'Go to forms menu', 'Print', and 'Help'.

7. Review the open PAR by menu section: **Entity Disclosures**

- Select **View** to review each entity and disclosable interest

The screenshot shows the 'Entity Disclosures' section of the UF eDisclose system. The left sidebar has three menu items: 'Request Information', 'Entity Disclosures' (highlighted in orange), and 'Activity Information'. The main content area is titled 'Entity Disclosures' and contains a section '1. Entity disclosures:' followed by a table. A yellow arrow points to the 'View' link next to the first row of the table.

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	\$10.00	N/A	5/6/2025
View ABC inc test			Self	Consulting or Other Professional Services	\$33,000.00	15	5/6/2025

At the top right of the main content area, there are links for 'Go to forms menu', 'Print', and 'Help'.

8. Review the **Activity Information**

- Select **EXIT** to close out of “View Pre-Approval Request”

Example of Activity Information

Compare << Go to forms menu Print Help

Request Information
Entity Disclosures
Activity Information

Consulting Activity, Professional Services or Outside Employment Information

- * Entity:** ?
Abb
- If you cannot find the entity in the above list, enter the details here:** ?
- * Describe the proposed activity:** ?
Consulting for industry
- * Start date:** ?
6/1/2025
- End date:** ?
- * Provide the estimated time that will be spent on this activity (days):** ?
7
- * Provide your anticipated compensation (dollars) for this activity:** ?
\$15,000.00
- * Does this entity do business with the University of Florida, including but not limited to, licensing technology, purchasing, renting, leasing, providing services and/or products, etc., to UF?** ?
☐ Yes ☒ No
- * Do you receive funding or in-kind support (e.g., drug, device, etc.) for research activities from this entity?** ?
☐ Yes ☒ No
- * Does this activity involve undergraduate or graduate students or any UF employees who you supervise in their UF role?** ?

Exit

9. Select **Submit My Review** to complete your review

The screenshot displays the COI (Conflict of Interest) system 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 > Initials- Consulting'. The main title is 'PAR00000063: Initials- Consulting'. The status is 'Under Review'. Key information includes: 'Date created: 5/18/2025 1:59 PM', 'Date submitted: 5/18/2025', 'Request type: Consulting Activity, Professional Services or Outside Employment', 'Assigned reviewer: Supervisor', 'Current review stage: Supervisor', 'Review stage: 1 of 2', 'Discloser: UNIVERSITY OF FLORIDA', and 'Discloser's employer: UNIVERSITY OF FLORIDA'. A flowchart shows the process: Pre-Submission -> Review (highlighted) -> Review Complete, with a branch for Clarification Requested. The 'Next Steps' section includes 'View Pre-Approval Request', 'Submit My Review' (highlighted with a yellow arrow), 'Request Clarifications', 'Assign Reviewer', 'Manage Ancillary Reviews', 'Add Comment', and 'Add Private Comment'. The 'History' section shows 'Pre-Approval Request Submitted' on 5/18/2025.

Under Review

Date created:
5/18/2025 1:59 PM
Date submitted:
5/18/2025

Next Steps

[View Pre-Approval Request](#)

☒ [Submit My Review](#)

[Request Clarifications](#)

[Assign Reviewer](#)

[Manage Ancillary Reviews](#)

[Add Comment](#)

[Add Private Comment](#)

PAR00000063: Initials- Consulting

Request type: Consulting Activity, Professional Services or Outside Employment
Assigned reviewer: Supervisor
Current review stage: Supervisor
Review stage: 1 of 2

Discloser:
Discloser's employer: UNIVERSITY OF FLORIDA

Flowchart:

```
graph LR; A[Pre-Submission] --> B[Review]; B --> C[Review Complete]; B --> D[Clarification Requested]; D --> B
```

History

Review Information

Filter by [Activity](#) [Add Filter](#) [Clear All](#)

Activity	Author	Activity Date
Pre-Approval Request Submitted		5/18/2025

10. A **POP UP** window will appear with the following:

- **Question 1:** Mark “**Yes**” or “**No**” to approval of the request
- **Question 2:** Add comment to explain if applicable
- **Question 3:** Add supporting document if applicable

11. Select **OK** to complete your review

Submit My Review

i Submitting this review will move the pre-approval request to the next stage of the review process.

1. * Do you recommend approval of this request? **?**

☐ Yes ☐ No [Clear](#)

2. Comments:

3. Supporting documents:

Name	Description
There are no items to display	

OK

Cancel

❖ End of **Review a Pre- Approval Request**

- Activity: **Intermediate Review Submitted**
- Review status: **Under Review** (for Level 2 Review by COI Office)

The screenshot displays the COI system interface for a disclosure profile. The top navigation bar includes links for Dashboard, COI, Disclosures, Requests, Certifications, Plans, Triggering Events, Reports, Meetings, and Help Center. The breadcrumb trail shows 'COI > Disclosures > Disclosure Profile for > Initials- Consulting'. A 'Help' icon is in the top right.

Under Review status is highlighted in an orange box. Key details include:

- Date created:** 5/18/2025 1:59 PM
- Date submitted:** 5/18/2025
- Request type:** Consulting Activity, Professional Services or Outside Employment
- Assigned reviewer:**
- Current review stage:** Research Compliance
- Review stage:** 2 of 2
- Discloser:**
- Discloser's employer:** UNIVERSITY OF FLORIDA

Next Steps section includes:

- [View Pre-Approval Request](#)
- [Manage Ancillary Reviews](#)
- [Add Comment](#)
- [Add Private Comment](#)

A workflow diagram shows the process: Pre-Submission → Review (highlighted in orange) → Review Complete. A 'Clarification Requested' box is connected to the 'Review' stage.

The **History** section is active, showing a table of activities:

Activity	Author	Activity Date
Intermediate Review Submitted		5/18/2025
Pre-Approval Request Submitted		5/18/2025