

Reviewer Quick Start Guide

May 2025

Review an Annual Certification

Review a Pre Approval Request (PAR)

UF RISC Office Conflicts of Interest Program 352-273-9174 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

EDisclose FLORIDA Dashboard	Сог			Hello, 👻
COI > Certifications	G Certifications Plans	Triggering Events Reports Meeting:	s Help Center	
Certifications				
	Review Awaiting Profile Update	Requires Management Plan All Certifications		
Fi	ilter by 😢 ID 💌 Er	nter text to search	I Filter 🔀 Clear All	۵
ID	Name	→ Date Modified State Discloser F	rst Name Discloser Last Name Assigned Reviewer Type	Related Research Project
CEF	RT000 Annual certification for	5/12/2025 1:09 PM Under Review	Annua	al
1	items	∢ page 1 o	[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



- 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



- 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



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 1. Discloser has information to disclose regarding entities: • Yes • No • modified 9 minutes ago • version 0.3 (Profile Updated) Old Value: [None]	Go to forms menu ➡ Print ▼
Entity Disclosure Information	hidden → visible 2. Entity Foreign Publicly Relation Discloser Disclosure Types Total Value Total Time (Days) Date Last Modified vew No No Self Consulting or Other Professional Services \$30,000.00 20 5/18/2025 5/18/2025 vew No No Self Consulting or Other Professional Services \$30,000.00 20 5/18/2025 5/18/2025 Vew No No Self Consulting or Other Professional Services \$30,000.00 20 5/18/2025 5/18/2025 Vew No No Self Consulting or Other Professional Services \$30,000.00 20 5/18/2025 5/18/2025 Vew Nodified 9 minutes ago + version 0.3 (Profile Updated) + Added: -	e section has been reviewed: 🜌

11. Select Submit Review to complete your review



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?

Question 2: Expiration date (defaults to one year)

Subm	Submit Review								
i w sure t	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.	 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 O No <u>Clear</u> 								
2.	2. * Expiration date:								
	5/16/2026								

Question 3: 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 Portfolio in conjunction with regulatory requirements.

. Notes: If yes above, use the space below to:
 Identify which Disclosable Interest(s) creates a conflict(s), and 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.
6
I. 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



Review a Pre Approval Request (PAR)

- 1. Go to <u>https://coi.ufl.edu</u> to log in to <u>eDisclose</u> 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*

STAG	eDiso	close								Hello,	
	Dashbo	ard	COI								
	Disclosures	Requests	Certifications	Plans T	riggering Events	Reports	Meetings	Help Center			
Re	equests	Pe	nding Requests A	pproved Requests	All Requests text to search		Add Filter	Clear All			¢
		ID	Name	Date Created	 Date Modified State 	Discloser Firs Name	t Discloser Last Name	Home Department	Assigned Reviewer	Request Type	
		PAR	0000000: First, Last-Co ABC Co.	onsulting <mark>- 5/4/2025</mark>	5/6/2025 Unde Revie	r ew		UNIVERSITY OF FLORIDA		Consulting Activity, Professional or Outside Employment	Services
		PAR	00000008 abc testing	5/6/2025	5/6/2025 Unde Revie	r ew		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

5TA FLOF	eDisc	close									H	ello,
	Dashbo	ard	COI									
	Disclosures	Requests	Certifications	Plans	Triggering Even	ts F	Reports	Meetings	Help Center			
С	OI > Requests											
P	lequests	Pen	ding Requests A	pproved Requests	All Requests							
		Filt	er by 😮 ID	Ente	er text to search		C	Add Filter	Clear All			۵
		ID	Name	Date Created	▲ Date Modified	State	Discloser Firs Name	t Discloser Last Name	Home Department	Assigned Reviewer	Request Type	
		PAR	0000000 First, Last-Co ABC Co.	onsulting- 5/4/2025	5 5/6/2025	Under Review			UNIVERSITY OF FLORIDA		Consulting Activity, or Outside Employ	Professional Services ment
		PAR	0000008 abc testing	5/6/2025	5 5/6/2025	Under Review			UNIVERSITY OF FLORIDA		Expert Witness	
		2 it	ems				∢ page	1 of 1 ▶				25 / page

5. Status of request is Under Review

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

Dachhear	100						
Disclosures R	quests Certifications	Plans Triggering Events	Reports Meetings	Help Center			
COI > Disclosures > Disclos	ire Profile for Wendy Olsen > abc	; testing			3 H		
Under Beview		0000: aba taatir					
onder neview	PARUUUU	ooos. abc testin	19				
Date created: 5/6/2025 8:24 PM	Request type: Expert \ Assigned reviewer:	Witness	Discloser: Discloser's	employer: UNIVERSITY OF FLORIDA			
Date submitted: 5/6/2025	Current review stage: Review stage: 1 of 2	Supervisor					
Next Steps	_						
View Pre-Approval Reque	t Pre-Submission	Review Co	omplete				
	Clarification						
Submit My Review		Requested /					
Submit My Review		noquesteu					
 Submit My Review Request Clarifications Assign Reviewer 		indanana					
 Submit My Review Request Clarifications Assign Reviewer Manage Ancillary Review 	History Review	Information					
 Submit My Review Request Clarifications Assign Reviewer Manage Ancillary Review Add Comment 	S History Review	Information ty Enter text to search	م + Add F	Filter 🗙 Clear All	•		

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



- 7. Review the open PAR by menu section: Entity Disclosures
 - Select View to review each entity and disclosable interest

Compare «								Go to for for interval interval interval interval interval	ms menu 🚦	🔒 Print 🔻	P Help
Request Information	Test	ite Disala surra									
Entity Disclosures	Ent	ity Disclosures									
Activity Information	1. E	Entity disclosures:									
		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		

8. Review the Activity Information

Select EXIT to close out of "View Pre-Approval Request"

Example of Activity Information



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

Dashboard	COI					
Disclosures Requ	uests Certifications Plans	Triggering Events	Reports	Meetings	Help Center	
COI > Disclosures > Disclosure	e Profile for > Initials- Consu	Iting				
Under Review	PAR0000063	B: Initials- Co	nsulti	ng		
Date created: 5/18/2025 1:59 PM Date submitted: 5/18/2025	Request type: Consulting Activity, Assigned reviewer: Current review stage: Supervisor Review stage: 1 of 2	Professional Services or Outside	e Employment	Discloser: Discloser's	employer: UNIVERSITY OF FLORIDA	
Next Steps View Pre-Approval Request	Pre-Submission R	view Review Comp	lete			
Submit My Review	Clari Reg	fication uested				
Assign Reviewer						
Manage Ancillary Reviews	History Review Informatio	n				
Add Comment	Filter by Activity	Enter text to search		Add F	ilter 🗶 Clear All	
Add Private Comment	Activity			Author	✓ Activity Date	
		bmitted			E/40/000E	

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	i My Review		
🚺 Sub	mitting this review will move the pre-a	pproval request to the next stage of the review process.	
1 . (* Do you recommend approva) Yes () No <u>Clear</u>	l of this request? 😮	
2. C	omments:		
		h)	
3. S	upporting documents:		
	+ Add		
	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)

