



## Reviewer Quick Start Guide

October 2025

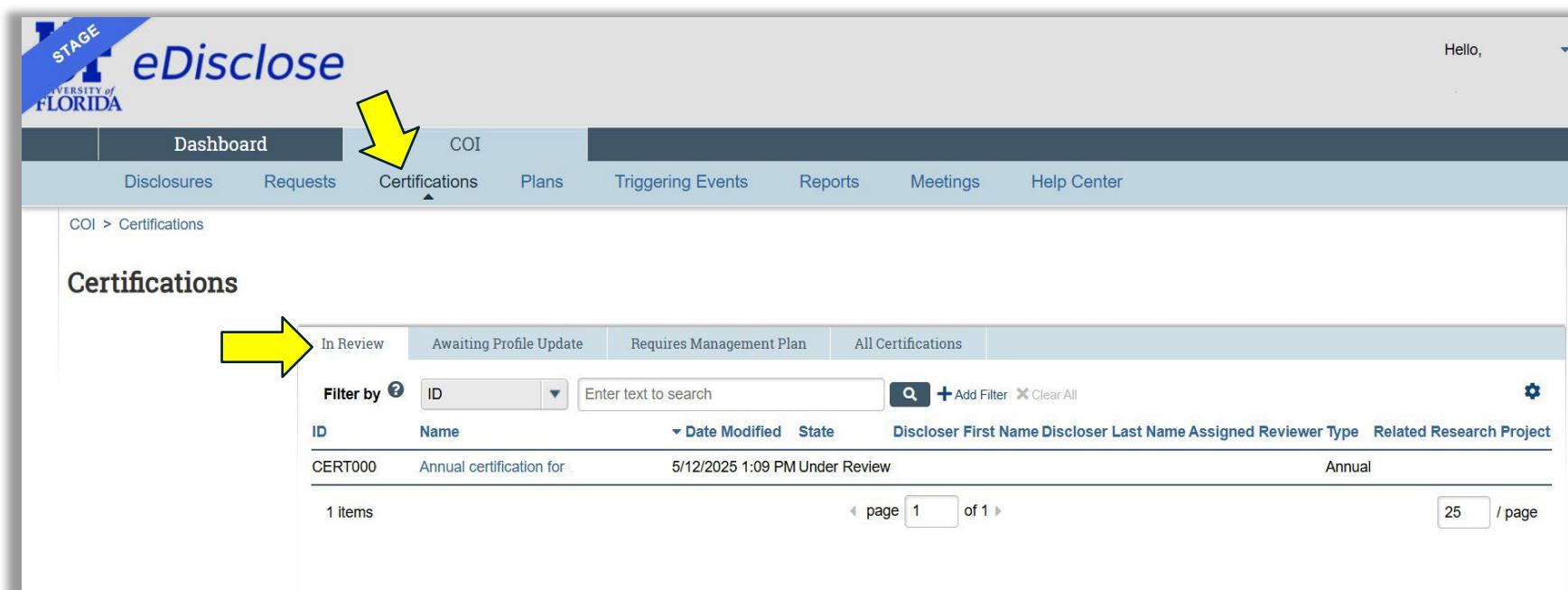
Review an Annual Certification

Review a Pre Approval Request (PAR)

UF RISC Office  
Conflicts of Interest Program  
352-392-9174  
[uf-coi@ufl.edu](mailto: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



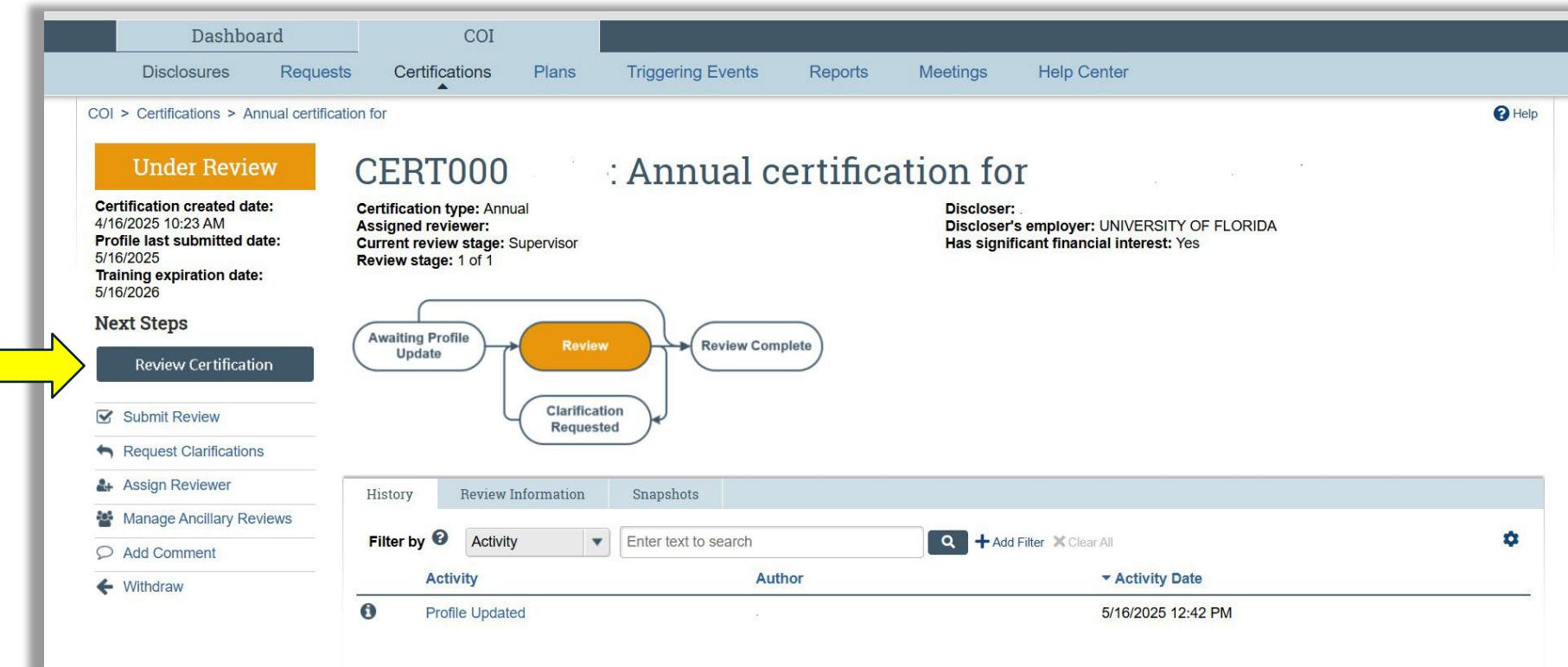
The screenshot shows the eDisclose COI workspace. The top navigation bar includes links for Dashboard, Requests, COI (which is the active workspace), Certifications (highlighted with a yellow arrow), Plans, Triggering Events, Reports, Meetings, and Help Center. The user is logged in as "Hello, [name]". The left sidebar shows the path "COI > Certifications". The main content area is titled "Certifications". At the top of the list, there are tabs: "In Review" (highlighted with a yellow arrow), "Awaiting Profile Update", "Requires Management Plan", and "All Certifications". Below the tabs is a search bar with "Filter by" options (ID, Name, Date Modified, State) and a "Clear All" button. The table lists one certification entry:

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	

At the bottom of the page, there are pagination controls: "1 items", "page 1 of 1", "25 / page", and a "Print" button.

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

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



The screenshot shows the COI (Conflict of Interest) system interface. The top navigation bar includes links for Dashboard, COI, Disclosures, Requests, Certifications (which is the active tab), Plans, Triggering Events, Reports, Meetings, and Help Center. The page title is "CERT000 : Annual certification for".  
**Under Review**  
Certification created date: 4/16/2025 10:23 AM  
Profile last submitted date: 5/16/2025  
Training expiration date: 5/16/2026  
**Next Steps**  
 Review Certification  
 Submit Review  
 Request Clarifications  
 Assign Reviewer  
 Manage Ancillary Reviews  
 Add Comment  
 Withdraw  
  
Certification type: Annual  
Assigned reviewer:  
Current review stage: Supervisor  
Review stage: 1 of 1  
  
Discloser:  
Discloser's employer: UNIVERSITY OF FLORIDA  
Has significant financial interest: Yes  
  
A process flow diagram shows the following states: Awaiting Profile Update, Review, Review Complete, and Clarification Requested. Transitions are from Awaiting Profile Update to Review, Review to Review Complete, and a feedback loop from Review back to Clarification Requested.  
  
History, Review Information, and Snapshots tabs are visible. A search bar and filter options (Activity, Author, Activity Date) are present. The search bar contains the text "Enter text to search".  
  
Recent activity table:

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

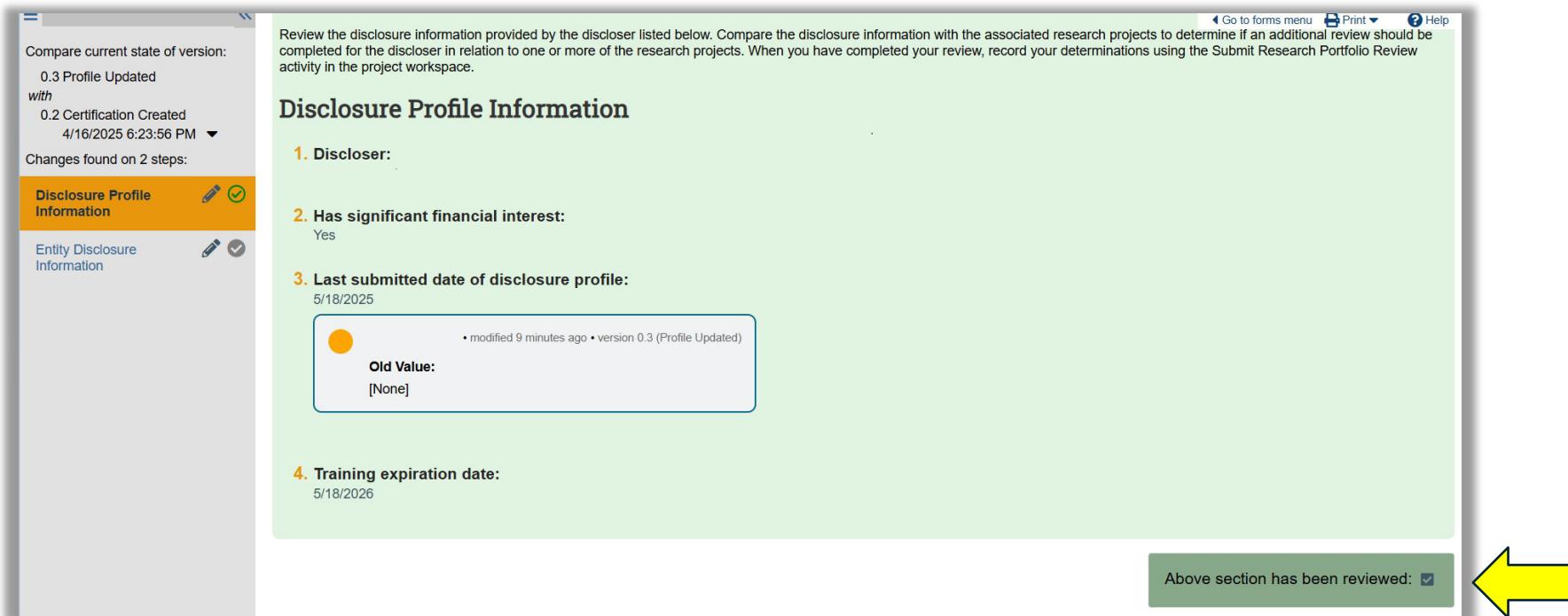
The screenshot shows a Smartform interface titled "Reviewing: CERT000". The left sidebar displays a comparison of the current state (version 0.3) with the previous state (version 0.2, created on 4/16/2025 at 10:23:11 AM). It shows two changes: "0.3 Profile Updated" and "0.2 Certification Created". The main content area is titled "Disclosure Profile Information" and contains the following questions:

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

For question 3, there is a callout box showing the "Old Value" as [None]. The callout also includes a timestamp: "modified 6 minutes ago • version 0.3 (Profile Updated)".

- 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

1. Discloser has information to disclose regarding entities:

Yes  No

• modified 9 minutes ago • version 0.3 (Profile Updated)

Old Value:  
[None]

hidden → visible

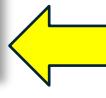
2. Entity disclosures:

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  
• modified 9 minutes ago • version 0.3 (Profile Updated)

► Added:

Above section has been reviewed:

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

Dashboard COI

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Certifications > Annual certification for Jasmeet Kalsi Help

**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

**Next Steps**

**Review Certification**

**Submit Review**

**Request Clarifications**

**Assign Reviewer**

**Manage Ancillary Reviews**

**Add Comment**

**Withdraw**

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

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

**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**  Search Add Filter Clear All

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**

**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**

Dashboard COI

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Certifications > Annual certification for ? Help

**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

**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](#)

**Flowchart:**

```

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

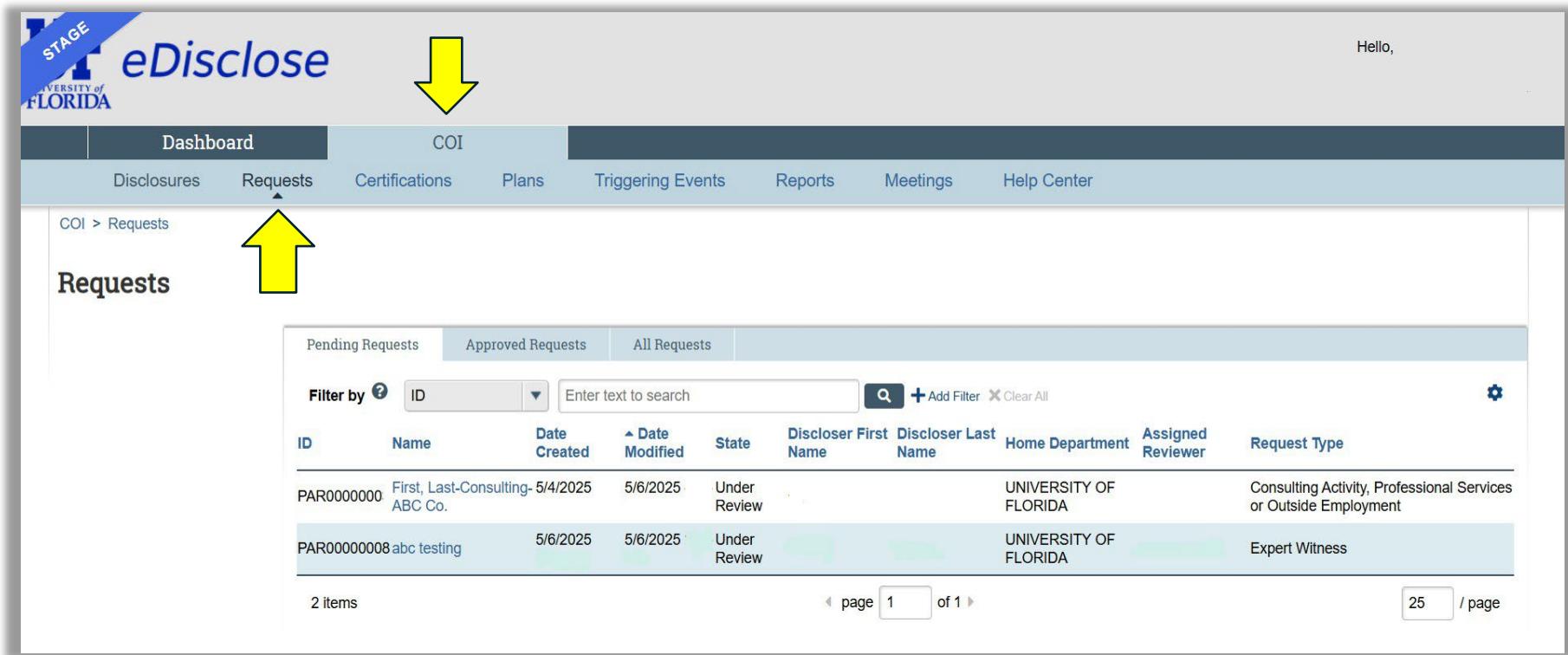
**History** **Review Information** **Snapshots**

**Filter by** **Activity**  [🔍](#) [+ Add Filter](#) [Clear All](#)

Activity	Author	Activity Date
<input checked="" type="checkbox"/> Review Submitted		5/18/2025
<a href="#">Profile Updated</a>		5/18/2025

## 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*



Hello,

COI > Requests

Requests

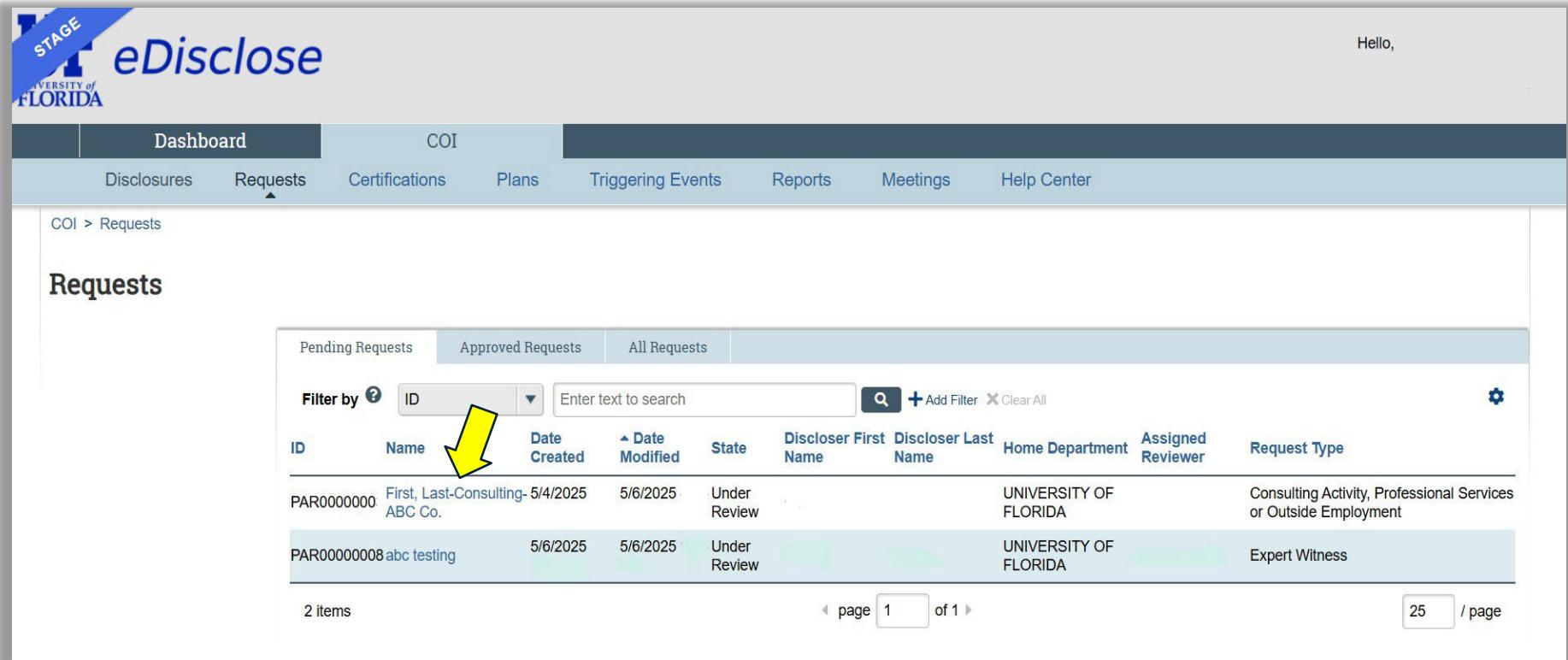
ID	Name	Date Created	Date Modified	State	Discloser First Name	Discloser Last Name	Home Department	Assigned Reviewer	Request Type
PAR00000000	First, Last-Consulting- ABC Co.	5/4/2025	5/6/2025	Under Review			UNIVERSITY OF FLORIDA		Consulting Activity, Professional Services or Outside Employment
PAR00000008	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**



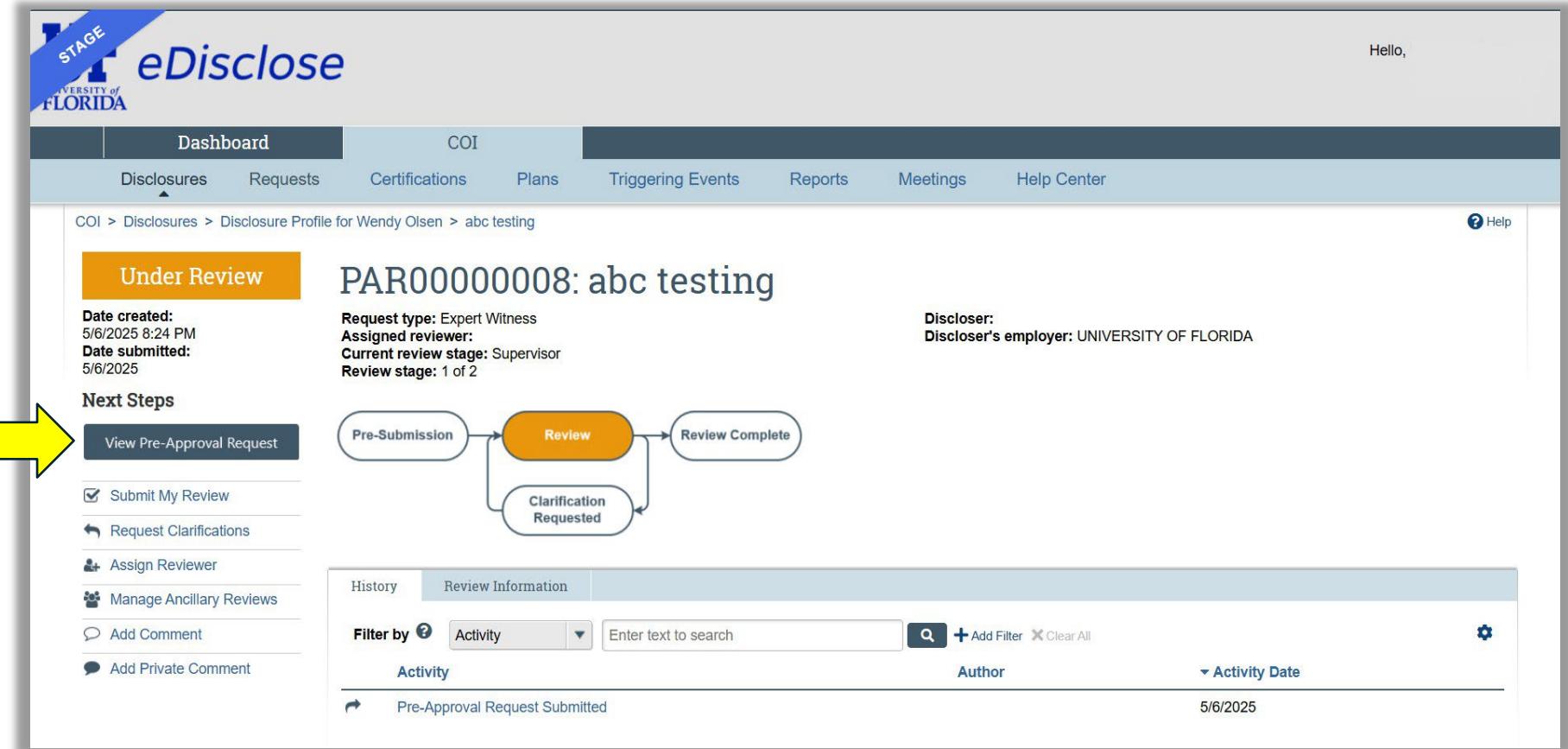
The screenshot shows the eDisclose software interface. At the top, there is a logo for the University of Florida with the text 'STAGE' and 'eDisclose'. The top navigation bar includes links for Dashboard, COI, Disclosures, Requests, Certifications, Plans, Triggering Events, Reports, Meetings, and Help Center. The 'Requests' link is highlighted. Below the navigation, a breadcrumb trail shows 'COI > Requests'. The main content area is titled 'Requests' and displays a table of pre-approval requests. The table has columns for ID, Name, Date Created, Date Modified, State, Discloser First Name, Discloser Last Name, Home Department, Assigned Reviewer, and Request Type. A yellow arrow points to the 'Name' column header. The table shows two rows of data:

ID	Name	Date Created	Date Modified	State	Discloser First Name	Discloser Last Name	Home Department	Assigned Reviewer	Request Type
PAR00000000	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

At the bottom of the table, it says '2 items'. To the right, there are buttons for 'page 1 of 1' and '25 / page'. The top right corner of the interface says 'Hello,'.

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

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



The screenshot shows the eDisclose system interface. At the top, there is a navigation bar with tabs for Dashboard, COI, Disclosures, Requests, Certifications, Plans, Triggering Events, Reports, Meetings, and Help Center. The COI tab is active. The main content area shows a disclosure profile for Wendy Olsen with a request ID of PAR00000008 and a subject of 'abc testing'. The status is 'Under Review'. A yellow arrow points to the 'View Pre-Approval Request' button in the 'Next Steps' section. The 'Next Steps' section also includes buttons for 'Submit My Review', 'Request Clarifications', 'Assign Reviewer', 'Manage Ancillary Reviews', 'Add Comment', and 'Add Private Comment'. To the right of the 'Under Review' status, there is a timeline diagram with nodes: 'Pre-Submission' (light blue), 'Review' (orange), 'Review Complete' (light blue), and 'Clarification Requested' (light blue). Arrows show the flow from Pre-Submission to Review, Review to Review Complete, and a feedback loop from Clarification Requested back to Review. Below the timeline, there are tabs for 'History' and 'Review Information', and a search/filter bar. The search bar includes fields for 'Filter by' (Activity), 'Enter text to search', a search icon, and buttons for 'Add Filter' and 'Clear All'. The 'Activity' filter is currently selected. The search results table shows a single row: 'Pre-Approval Request Submitted' with a timestamp of '5/6/2025'.

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

UF eDisclose

Hello,

Reading: PAR0000000

1. Requestor:

2. \* Request name/title: abc testing

3. \* Type of request: Expert Witness

Entity Disclosures

Activity Information

Request Information

Compare

Go to forms menu Print Help

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

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

Entity Disclosures

1. Entity disclosures:

Entity	Foreign Entity?	Publicly Traded?	Relation to Discloser	Disclosure Types	Total Value	Commitment (Days)	Last Modified
DUP National Institute of Standards and Technology	No	No	Self	Equity	\$10.00	N/A	5/6/2025
ABC inc test			Self	Consulting or Other Professional Services	\$33,000.00	15	5/6/2025

View DUP National Institute of Standards and Technology

View ABC inc test

Request Information

Entity Disclosures

Activity Information

Compare

Go to forms menu Print Help

## 8. Review the **Activity Information**

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

### Example of Activity Information

Compare

Request Information

Entity Disclosures

**Activity Information**

Consulting Activity, Professional Services or Outside Employment Information

1. \* Entity: [?](#)  
Abb .

If you cannot find the entity in the above list, enter the details here: [?](#)

2. \* Describe the proposed activity: [?](#)  
Consulting for industry

3. \* Start date: [?](#)  
6/1/2025

4. End date: [?](#)

5. \* Provide the estimated time that will be spent on this activity (days): [?](#)  
7

6. \* Provide your anticipated compensation (dollars) for this activity: [?](#)  
\$15,000.00

7. \* 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

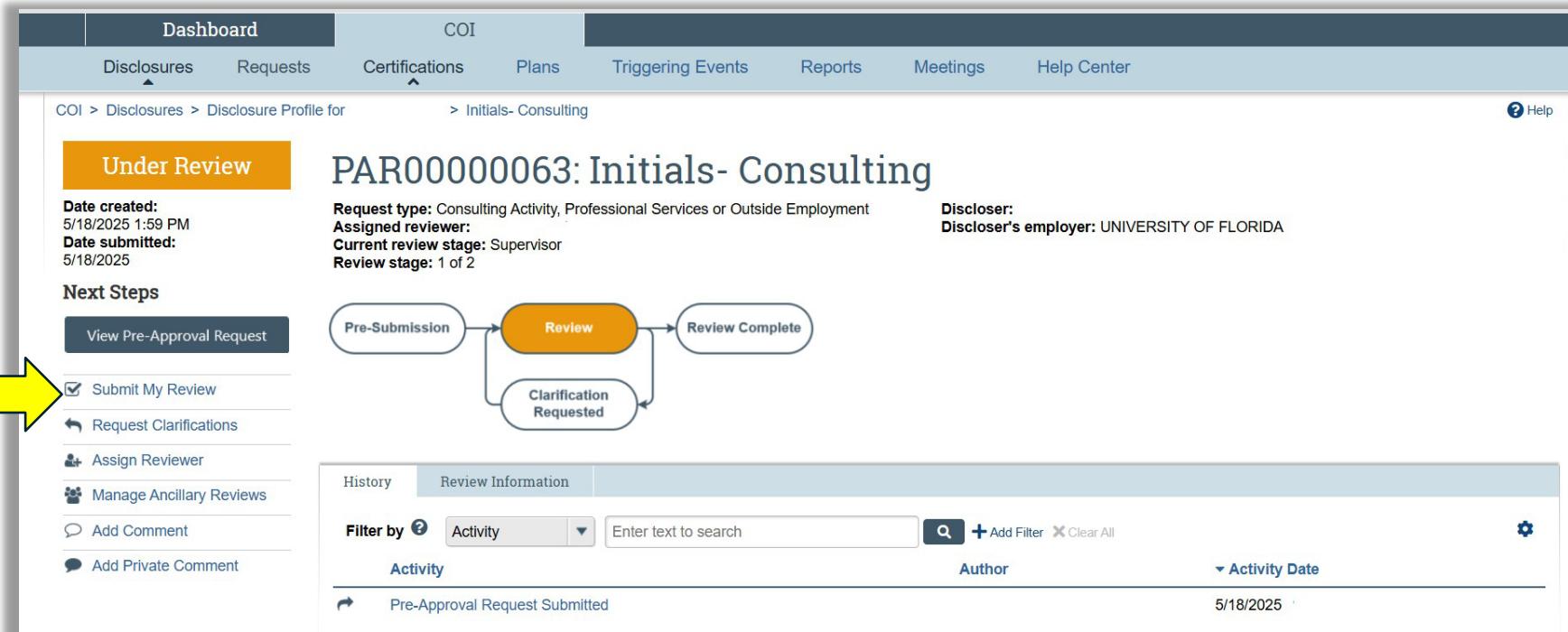
8. \* Do you receive funding or in-kind support (e.g., drug, device, etc.) for research activities from this entity? [?](#)  
 Yes  No

9. \* 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 shows the COI (Conflict of Interest) system interface. The top navigation bar includes links for Dashboard, COI, Disclosures, Requests, Certifications, Plans, Triggering Events, Reports, Meetings, and Help Center. The main content area displays a disclosure profile for PAR00000063: Initials- Consulting. The profile shows the following details:

- Date created:** 5/18/2025 1:59 PM
- Date submitted:** 5/18/2025
- Request type:** Consulting Activity, Professional Services or Outside Employment
- Assigned reviewer:** (not specified)
- Current review stage:** Supervisor
- Review stage:** 1 of 2

The status is marked as **Under Review**. A yellow arrow points to the **Submit My Review** button in the **Next Steps** section. The **Next Steps** section also includes links for View Pre-Approval Request, Request Clarifications, Assign Reviewer, Manage Ancillary Reviews, Add Comment, and Add Private Comment.

The review process is depicted as a flowchart with the following steps: Pre-Submission → Review → Review Complete. There is a feedback loop from Review back to Clarification Requested, which then leads to Review Complete.

The **History** tab is selected in the activity timeline, showing a single entry: "Pre-Approval Request Submitted" on 5/18/2025. The timeline also includes a "Review Information" tab and a search/filter bar.

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:**

+ 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)

Dashboard COI

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile for > Initials- Consulting

**Under Review**

**PAR00000063: Initials- Consulting**

**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**

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

Pre-Submission → Review → Review Complete

Clarification Requested

History Review Information

Filter by **Activity** Enter text to search

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