



## **Reviewer Quick Start Guide**

**November 2025**

**Assign an Ancillary Review**

**Submit an Ancillary Review**

**UF RISC Office**  
**Conflicts of Interest Program**

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## Assign an Ancillary Review to a Pre Approval Request or Annual Certification

1. Within an individual **Annual Certification** or **Pre Approval** workspace, select **Manage Ancillary Reviews**

Example below is for a Pre Approval Request (PAR)

The screenshot displays the COI system interface. The top navigation bar includes 'Dashboard', 'COI', and various sub-sections like 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The breadcrumb trail shows 'COI > Disclosures > Disclosure Profile for > ABC Test'. The main content area is titled 'Under Review' and shows details for 'PAR00000 : ABC Test'. It includes fields for 'Date created', 'Date submitted', 'Request type', 'Assigned reviewer', 'Current review stage', and 'Review stage'. A flowchart illustrates the review process: Pre-Submission, Review, Review Complete, and Clarification Requested. The 'Next Steps' section lists actions like 'View Pre-Approval Request', 'Submit My Review', 'Request Clarifications', 'Assign Reviewer', 'Manage Ancillary Reviews' (highlighted with a yellow arrow), 'Add Comment', and 'Add Private Comment'. The bottom section shows a 'History' tab with a table of activities, including 'Pre-Approval Request Submitted' on 9/12/2025 3:02 PM.

COI > Disclosures > Disclosure Profile for > ABC Test

**Under Review**

**PAR00000 : ABC Test**

**Date created:** 9/12/2025 3:00 PM  
**Date submitted:** 9/12/2025

**Request type:** Consulting Activity and other Professional Services  
**Assigned reviewer:** Supervisor  
**Current review stage:** Supervisor  
**Review stage:** 1 of 2

**Discloser:** UNIVERSITY OF FLORIDA  
**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

**Review Process Flowchart:**

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

**History**

**Review Information**

Filter by: Activity [Enter text to search] [Add Filter] [Clear All]

Activity	Author	Activity Date
Pre-Approval Request Submitted		9/12/2025 3:02 PM

2. A SmartForm window will appear. Select the **+Add** button to be prompted to assign **Individual** or **Organizational** level review

Execute "Manage Ancillary Reviews" on PAR00000024 - Google Chrome

hrspufstage2.huronclick.com/COI/sd/ResourceAdministration/Activity/form?ActivityType=com.webridge.entity.Entity%5BBOID%5B159E35D2969811EB598428DC317E2C...

Manage Ancillary Reviews

1. Identify each organization or person that should provide additional review:

+ Add

Review Type	Organization	Person	Required	Instructions	Instruction Documents	Completed	Comments	Supporting Documents
There are no items to display								

OK

Cancel

3. A new POP UP window will open to show the **Add Ancillary Review** page to assign the appropriate reviewer
- Item 1:**
    - Select an **Organization** as a reviewer if College leadership (i.e., Dean or Associate Dean for Research), or
    - Select a **Person** as a reviewer (i.e., Department Chair, non-conflicted faculty)
  - Item 2:** Select **College** as the review type if applicable
  - Item 3:** Mark “**Yes**” or “**No**” to a require a response from the ancillary reviewer
  - Items 4 and 5:** Include instructions or documentation for the review if applicable

Execute "Manage Ancillary Reviews" on PAR00000024 - Google Chrome

hrsputstage2.huronclick.com/COI/sd/ResourceAdministration/Activity/form?ActivityType=com.webbridge.entity.Entity%5B0ID%5B159E35D2969811EB598428DC317E2C...

### Manage Ancillary Reviews

#### Add Ancillary Review

1. Identify each organization or person

+ Add

Review Type	Organization	Person	Required
There are no items to display			

or

Select a person as reviewer:

2. Review type:

☐ College

☐ Self Insurance Program (Expert Witness - Medical)

[Clear](#)

3. \* Is a response required?

☐ Yes ☐ No [Clear](#)

4. Instructions for ancillary reviewer:

5. Instruction documents for ancillary reviewer:

\* Required

OK OK and Add Another Cancel

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

❖ End of how to **Assign an Ancillary Review**

- Activity: Managed Ancillary Reviews
- Review status: **Under Review**

The screenshot displays the COI 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 'ABC Test'. The main content area features a large orange 'Under Review' badge. Below it, the request details are: 'Request type: Consulting Activity and other Professional Services', 'Assigned reviewer: Supervisor', 'Current review stage: Supervisor', and 'Review stage: 1 of 2'. The discloser is 'UNIVERSITY OF FLORIDA'. A flowchart shows the review process: 'Pre-Submission' leads to 'Review' (highlighted in orange), which can lead to 'Review Complete' or 'Clarification Requested' (which loops back to 'Review'). On the left, a 'Next Steps' section includes a 'View Pre-Approval Request' button and a list of actions: 'Submit My Review' (checked), 'Request Clarifications', 'Assign Reviewer', 'Manage Ancillary Reviews', 'Add Comment', and 'Add Private Comment'. At the bottom, a 'History' table shows the following activities:

Activity	Author	Activity Date
Managed Ancillary Reviews		9/12/2025 3:23 PM
Pre-Approval Request Submitted		9/12/2025 3:02 PM

## Submit an Ancillary Review for a Pre Approval Request or Annual Certification

1. If you receive an email notification that an **Annual Certification** or **Pre Approval Request** has been assigned to ancillary review, select the hyperlink in the notification and log in to **eDisclose** at <https://coi.ufl.edu/> with your GatorLink credentials
2. Within an individual **Annual Certification** or **Pre Approval** workspace, select **View Pre Approval Request** or **View Certification** to review the form content. Click **Exit** to return to the workspace.
3. In the **History** tab of the PAR or certification workspace, select the **Managed Ancillary Reviews** hyperlink to review comments if applicable. Click **Close** to exit.
4. Select **Submit Ancillary Review**

Example below is for a Pre Approval Request (PAR)

The screenshot shows the eDisclose system interface for a Pre Approval Request (PAR) workspace. The top navigation bar includes 'Dashboard', 'COI', 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The breadcrumb trail is 'COI > Disclosures > Disclosure Profile for > ABC Test'. The main content area displays 'PAR000 : ABC Test' with details: 'Request type: Consulting Activity and other Professional Services', 'Assigned reviewer:', 'Current review stage: Research Compliance', and 'Review stage: 2 of 2'. The 'Discloser' is 'UNIVERSITY OF FLORIDA'. A flowchart shows the process: 'Pre-Submission' -> 'Review' -> 'Review Complete', with a 'Clarification Requested' loop from 'Review' back to 'Pre-Submission'. The 'Next Steps' sidebar on the left includes 'View Pre-Approval Request', 'Submit Ancillary Review' (checked), 'Add Comment', and 'Add Private Comment'. A yellow arrow points to the 'Submit Ancillary Review' option. The 'History' tab is active, showing a table of activities:

Activity	Author	Activity Date
Managed Ancillary Reviews		10/3/2025 11:16 AM
Intermediate Review Submitted		10/3/2025 11:16 AM
Pre-Approval Request Submitted		10/3/2025 11:15 AM

5. A new POP UP Window will open to show the **Submit Ancillary Review** page for to complete the review\
- Item 1:** Click the checkbox to select the **Person** or **Organization** submitting the review
  - Item 2:** Mark “**Yes**” or “**No**” to *Have you completed your review of this request or certification and/or provided input, if needed?*
  - Item 3:** Include comments if applicable
  - Item 4:** Add supporting document if applicable

The screenshot shows a web browser window titled "Execute 'Submit Ancillary Review' on PAR0000" with the URL "hrsfulstage2.huronclick.com/COI/sd/ResourceAdministration/Activity/form?ActivityType=com.webbridge.entity.Entity%5B0ID%5B1D3CDDBC982211E...". The form is titled "Submit Ancillary Review" and contains the following sections:

- 1. \* Select the review you are submitting:**

Organization	Person	Review Type	Required Instructions	Instruction Documents
<input type="checkbox"/> COLLEGE-		College	yes	
- 2. \* Have you completed your review of this request and/or provided input, if needed?**

☐ Yes ☐ No [Clear](#)
- 3. Comments:**
- 4. Supporting documents:**

Name
There are no items to display

At the bottom right of the form are "OK" and "Cancel" buttons.

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

❖ End of how to **Submit an Ancillary Review**

➤ Activity: Submitted Ancillary Review

➤ Review status: **Under Review**

The screenshot displays the 'COI' (Conflict of Interest) management interface. The top navigation bar includes 'Dashboard', 'COI', 'Disclosures', 'Requests', 'Certifications', 'Plans', 'Triggering Events', 'Reports', 'Meetings', and 'Help Center'. The breadcrumb trail indicates the user is viewing the 'Disclosure Profile for ABC Test'.

**Under Review**

**PAR0000 : ABC Test**

**Date created:** 10/3/2025 11:12 AM  
**Date submitted:** 10/3/2025

**Request type:** Consulting Activity and other Professional Services  
**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
- Submit Ancillary Review
- Add Comment
- Add Private Comment

**Review Process Flow:**

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

**History**

Activity	Author	Activity Date
Submitted Ancillary Review		10/3/2025 11:29 AM
Managed Ancillary Reviews		10/3/2025 11:16 AM
Intermediate Review Submitted		10/3/2025 11:16 AM
Pre-Approval Request Submitted		10/3/2025 11:15 AM