



## Reviewer Quick Start Guide

November 2025

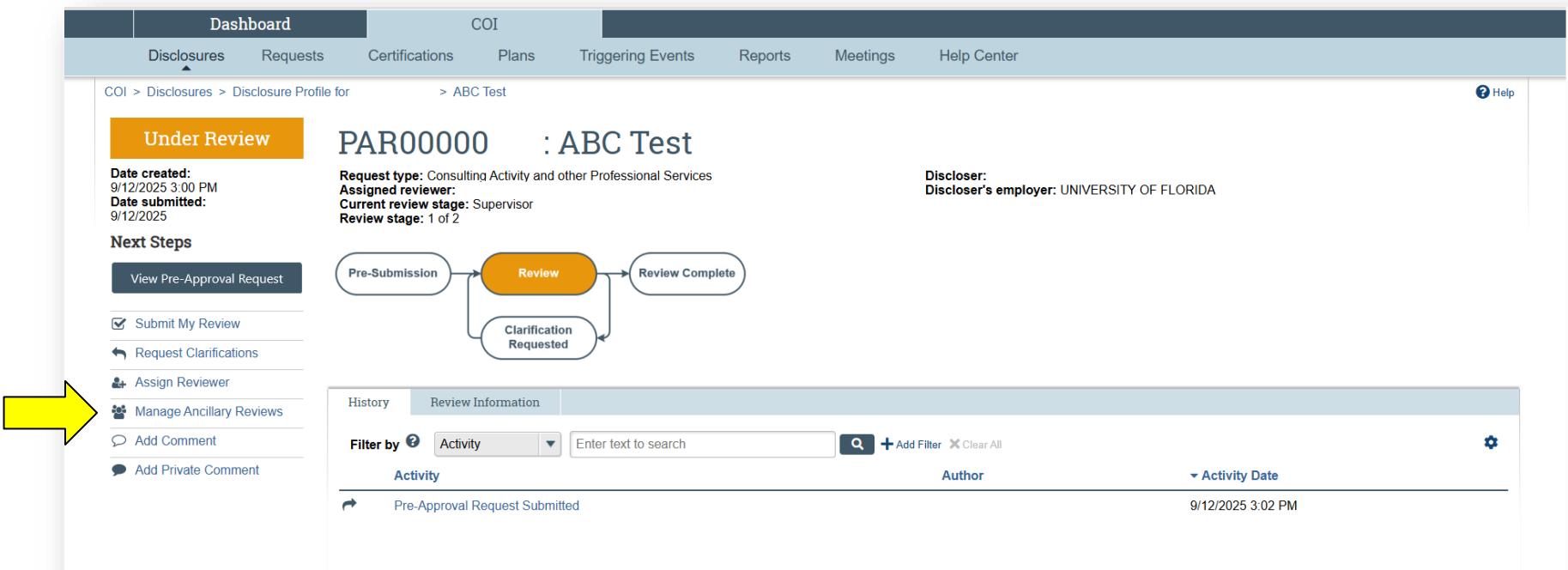
[Assign an Ancillary Review](#)  
[Submit an Ancillary Review](#)

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

## 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 shows the COI software interface with the following details:

- Header:** Dashboard, COI, Disclosures, Requests, Certifications, Plans, Triggering Events, Reports, Meetings, Help Center.
- Breadcrumb:** COI > Disclosures > Disclosure Profile for > ABC Test
- Section:** Under Review (highlighted in orange)
- Request ID:** PAR00000 : ABC Test
- Request Type:** Consulting Activity and other Professional Services
- Assigned Reviewer:** (not explicitly named)
- Current Review Stage:** Supervisor
- Review Stage:** 1 of 2
- Next Steps:**
  - [View Pre-Approval Request](#)
  - [Submit My Review](#)
  - [Request Clarifications](#)
  - [Assign Reviewer](#)
  - [Manage Ancillary Reviews](#)
  - [Add Comment](#)
  - [Add Private Comment](#)
- Workflow Diagram:** Pre-Submission → Review → Review Complete. A feedback loop from Review to Clarification Requested.
- History:** Pre-Approval Request Submitted (Activity, Author, Activity Date: 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

hrspuflstage2.huronclick.com/COI/sd/ResourceAdministration/Activity/form?ActivityType=com.webridge.entity.Entity%5BOID%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  
hrspuflstage2.huronclick.com/COI/sd/ResourceAdministration/Activity/form?ActivityType=com.webridge.entity.Entity%5BOID%5B159E35D2969811EB598428DC317E2C...

Manage Ancillary Reviews

1. Identify each organization or person

+ Add

Review Organization Person Requirements

There are no items to display

PA

Request Assign Current Review

Pre-S

Histor

Filter

5. Instruction documents for ancillary reviewer

\* Required

OK OK and Add Another Cancel

**Add Ancillary Review**

1. Select an organization 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**

Dashboard COI

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile ABC Test

**Under Review**

**PAR00 : 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:**  
**Current review stage:** Supervisor  
**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](#)

Pre-Submission → Review → Review Complete

Clarification Requested

History Review Information

Filter by **Activity** Enter text to search

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)

Dashboard COI

Disclosures Requests Certifications Plans Triggering Events Reports Meetings Help Center

COI > Disclosures > Disclosure Profile for > ABC Test

Under Review PAR000 : 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

Submit Ancillary Review

Add Comment

Add Private Comment

Pre-Submission -> Review -> Review Complete

Clarification Requested

History Review Information

Filter by Activity Enter text to search + Add Filter Clear All

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

Execute "Submit Ancillary Review" on PAR0000 : Google Chrome  
hrspuflstage2.huronclick.com/COI/sd/ResourceAdministration/Activity/form?ActivityType=com.webridge.entity.Entity%5BOID%5B1D3CDDBC982211E...

### Submit Ancillary Review

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

Organization Person Review Type Required Instructions Instruction Documents

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:**

[+ Add](#)

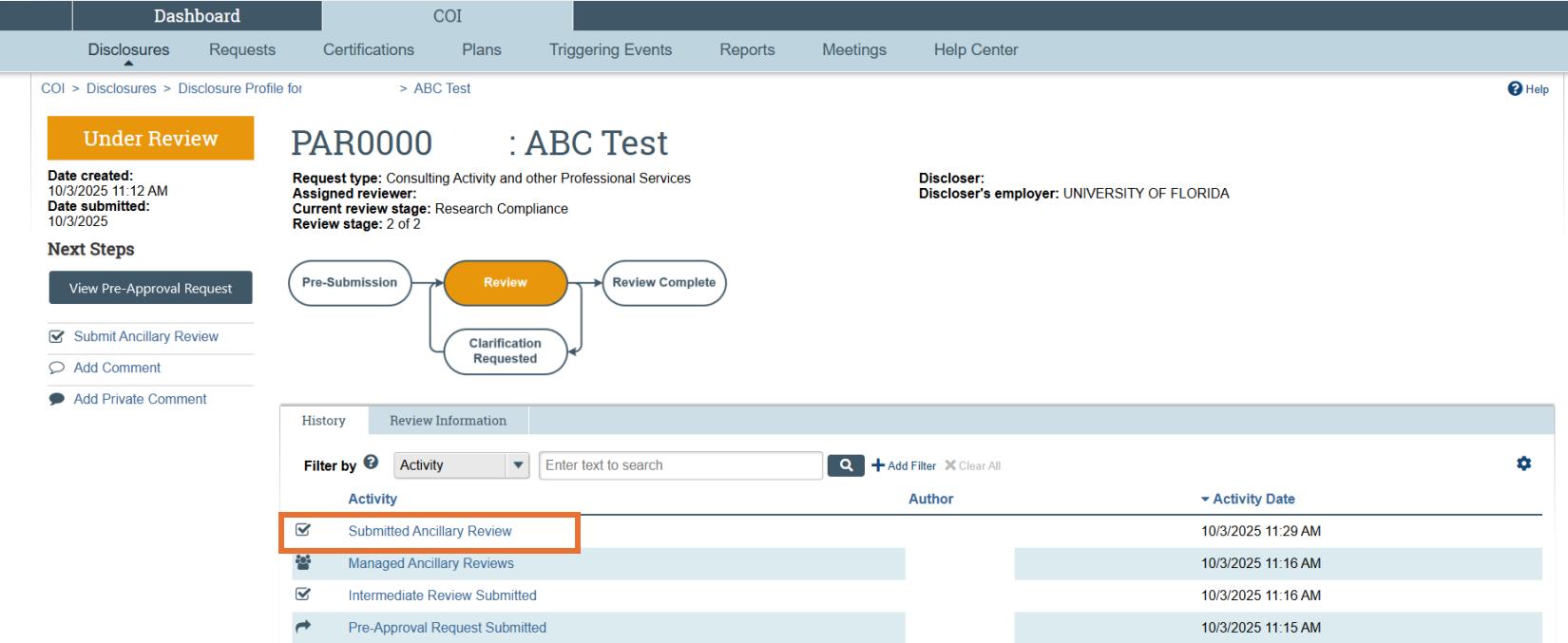
Name  
There are no items to display

OK Cancel

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 shows 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 main content area shows the disclosure profile for 'PAR0000 : ABC Test'. A yellow box highlights the 'Under Review' status. Below this, detailed information is provided: Date created: 10/3/2025 11:12 AM, Date submitted: 10/3/2025, Request type: Consulting Activity and other Professional Services, Assigned reviewer: (not specified), Current review stage: Research Compliance, and Review stage: 2 of 2. A process flow diagram shows the workflow: Pre-Submission → Review → Review Complete, with a feedback loop from Review back to Clarification Requested. The 'Next Steps' section includes buttons for View Pre-Approval Request, Submit Ancillary Review (which is checked), Add Comment, and Add Private Comment. The 'Review Information' tab is selected in the bottom navigation, showing a table of activity history. The 'Activity' column lists: Submitted Ancillary Review (checked and highlighted with a red box), Managed Ancillary Reviews, Intermediate Review Submitted, and Pre-Approval Request Submitted. The 'Author' and 'Activity Date' columns provide the details for each activity.

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