

COI

Discloser Reference Guide

November 2025

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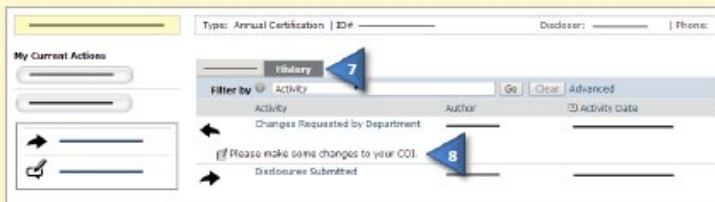
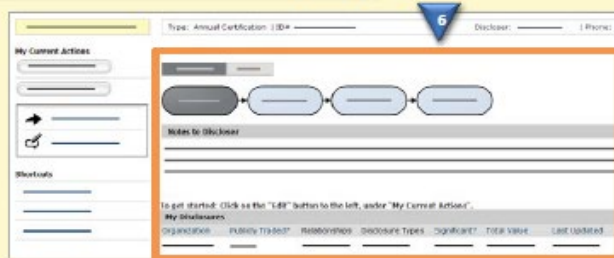
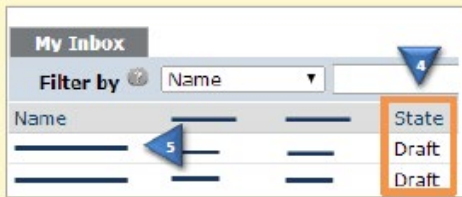
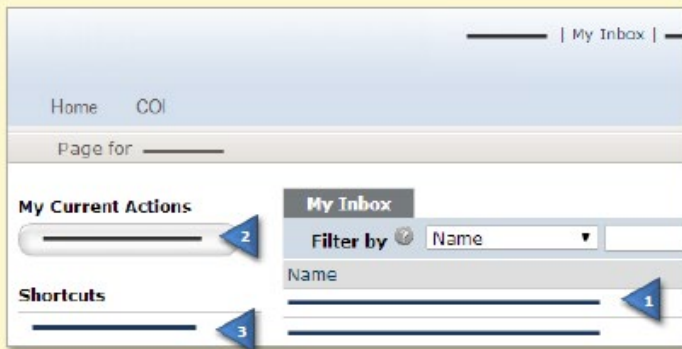
Click COI - Discloser Quick Reference

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Navigation and Basic Tasks

When you first log in, you will be on the My Inbox page.
This topic lists where to find certifications and the basic tasks you will perform.



Where Do I Find?

From **My Inbox**, you can find:

1. *Certifications* that require you to take action.
2. *Actions* that you can perform (e.g., **Create** or **Update a Certification**).
3. *Shortcuts* that provide access to other items such as your disclosures or reports.

What Do I Do?

4. Review the **State** of certifications in **My Inbox**. The state provides a clue as to what to do next. For example, **Draft** means you haven't submitted the certification for review.

Open a Certification

5. From **My Inbox**, click the certification's **Name**.
6. The certification's **Workspace** will open.

View Certification History

7. From the certification **Workspace**, click the **History** tab.
8. The **History** lists the activity taken on a certification including any comments, attachments, or correspondence added.

The screenshot shows the COI system interface. At the top, there are links for 'Home' and 'COI'. Below this is a 'Page for' dropdown. The main content area is divided into two sections: 'My Current Actions' and 'My Disclosures'. The 'My Disclosures' section has a 'Filter by' dropdown set to 'Organization' and a table with columns 'Organization' and 'Last Updated'. The 'Last Updated' column is highlighted with a red box and a blue arrow labeled '10'. Below this is the 'My Certifications' section, which has a 'Filter by' dropdown set to 'Name' and a table with columns 'Name' and 'Status'. The 'Status' column is highlighted with a red box and a blue arrow labeled '12'. The 'Certifications' tab is highlighted with a red box and a blue arrow labeled '11'. The 'My Disclosures' link in the left sidebar is highlighted with a red box and a blue arrow labeled '9'.

Find Previous Certifications

9. On the left, click **Certifications**.
10. The **Disclosures** tab shows details for each disclosure, including when it was last updated.
11. Click the **Certifications** tab.
12. Sort or filter by **Status** to find certifications that have completed the review process.

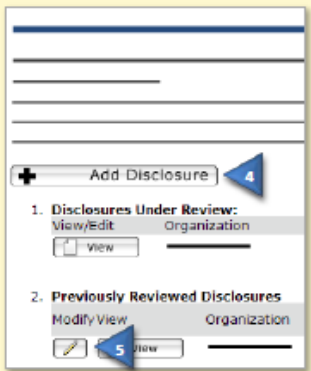
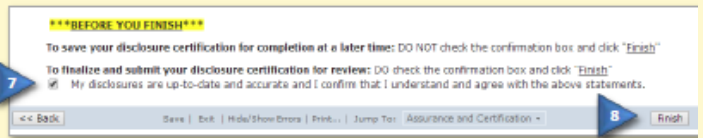
Before You Start

Before you submit a certification, gather the following information. This will help you complete the forms.

- ☐ Any consulting agreements you have signed this year
- ☐ Receipts from travel paid by outside companies
- ☐ Any stock option agreements
- ☐ Your stock portfolio summary
- ☐ Your IRS 1040 and/or 1099 forms

Submit an Annual Certification for Review

You will receive an email to submit your certification. See [Before You Start](#) before performing the steps below.

Start the Certification	
	1. Click the e-mail link to open the certification. 2. If you no longer have the e-mail, from My Inbox, click Edit My Certification on the left. 3. Complete the pages. Click Continue to move to the next page. NOTE: If you have submitted a certification before, the forms will show your previous answers. Update them appropriately.
Update Disclosures	
	Depending on your answers, the Disclosure Details page may appear. 4. To add a disclosure, click Add Disclosure. Complete the pages and click Finish on the last page. 5. To edit a previously reviewed disclosure, click the pencil. a. The disclosure moves under Disclosures Under Review. b. Click Edit. Update the pages and then click Finish on the last page. 6. To remove a disclosure, click the red X. Select Yes and click OK.
Finish and Submit	
	7. On the last page, select the check box to submit the certification. NOTE: To submit later, leave the check box blank. Use the Submit action on the certification workspace to submit.

Respond to Clarification or Change Requests

If a reviewer has questions or requires you to change your certification, you will receive an email notification alerting you.
Review the request details and then respond to the request.

To: _____
Link: [Annual Certification](#) 1

My Current Actions
Edit 2
Filter by

Submit Changes 3

Submit Changes
Please provide any additional notes to the Office of Research Compliance reviewer:

Please attach any documents that clarify your changes for the reviewer:
Add
Name Description
There are no items to display
5 OK Cancel

Review the Request Details

1. Read the email for details about the clarification or change request. Click the link within the email notification to open the submission.

If you no longer have the email, see [Open a Certification](#) and then [View Certification History](#) to see reviewer comments.

Respond to the Request

2. To update the certification, click **Edit** on the left and make the requested changes. Otherwise got to the next step. You will be able to enter a response to the reviewer before submitting.
3. Click **Submit Changes**.
4. (Optional) In the **Notes** box, type your response to the reviewer.
5. Click **OK**.

Respond to a Management Plan

As a result of reviewing your certification, the COI office may issue you a plan to manage your conflicts of interest. Review the management plan and then submit your response to the plan.

To: _____ Link: Annual Certification 1 My Current Actions Submit Response Plan 3 Disclosures Management Plan 2 Submit Response Plan As the discloser, I have reviewed the decision made by the office of Conflict of Interest. My decision is to Accept 4 Notes: Attachments: Name Description There are no items to display OK Cancel 5	Review the Management Plan - Click the certification link in the e-mail. If you no longer have the e-mail, see Open a Certification and then View Certification History. Review the correspondence letter. - On the Disclosures workspace, click the management plan link to open the management plan and then review it. Submit Your Response - Click Submit Response Plan. - Select Accept to accept the management plan. If you have questions about the management plan, select Request Further Clarification and type your questions in the Notes box. The certification will move back to the COI administrator's inbox to review. - Click OK. You can logoff the system.
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Update Your Certification

As a result of reviewing your certification, the COI office may issue you a plan to manage your conflicts of interest. Review the management plan and then submit your response to the plan.

Update Your Certification

1. From My Inbox, click **Create My Certification**.
2. Type the reason for the update and then click **OK**.
3. In the certification workspace, click **Edit**.
4. Update the certification.

Tip: Click the **Jump To:** menu to go to the page you want to update.

See [Update Disclosures](#) to add, edit, or delete disclosure details.
5. On the last certification page, select the check box to submit the updated certification.
6. Click **Finish**. You can log off the system.