

## MyDisclosures Technical User Guide

### For Forms in Review Complete: Preparing Correspondence status

A disclosure form has the status “**Review Complete: Preparing Correspondence**” when a Primary Supervisor selects “Approve with Comment” when submitting their review. To finalize the review of forms in this state, additional steps by the Primary Supervisor in the Supervisor Center are required.

#### Login

- ⇒ Go to [www.mydisclosures.pitt.edu](http://www.mydisclosures.pitt.edu).
- ⇒ Click on either Pitt Passport or UPMC to access the form. *Choose the institution you are employed by to log in. If you are dually employed, you may use either.*
- ⇒ If you have trouble with your login:  
  
Pitt employees should contact the Pitt 24/7 IT Help Desk at (412) 642-HELP (4357).  
UPMC Employees should contact the UPMC Help Desk at (412) 647-HELP (4357).

MyDisclosures



Use Pitt Credentials if you click Pitt Passport. Use UPMC Credentials if you click UPMC. Dual Employees may click either.

For technical assistance, including help with your login contact your employer's help desk. Pitt personnel should contact the Pitt 24/7 IT Help Desk at (412) 624-HELP (4357). UPMC personnel should contact the UPMC ISD Help Desk at (412) 647-HELP (4357).

## Forms listed as “Review Complete: Preparing Correspondence”

All forms listed with a state of “Review Complete: Preparing Correspondence” are not yet final. They will appear in your **Supervisor Center** under the **Action Items** tab.

To finalize disclosures in this state, first click on the form in the “**Review Complete: Preparing Correspondence**” state from the list.

The screenshot shows the 'Supervisor Center' interface. At the top, there are tabs: 'My Inbox', 'Supervisor Center' (selected), and 'Disclosures'. Below the tabs, there's a 'Supervisor Guidance' section with links like 'Step-by-Step Guides to Submitting Reviews', 'Supervisor Guidance', 'Supervisor Training', 'Guidance for Disclosers', and 'Request to Add or Remove a Mandatory Discloser'. The main area is titled 'Supervisor Center' and has tabs for 'Action Items', 'In Process Items', 'Reviewed Items', and 'Secondary Supervisor Items'. The 'Action Items' tab is selected, showing a message: 'Action Items- All items in this section require your review.' followed by two points: '1. Disclosures in "Department Review" must be reviewed individually' and '2. Disclosures in "No Interests Disclosed" can be batch reviewed.' Below this is a 'Select All Batchable Items:' checkbox. A search bar is present with 'Filter by' and 'ID' selected. A table lists disclosures with columns: ID, Name, Date Modified, State, Primary Supervisor, Secondary Supervisor(s), and Batch Approve?. The first row shows 'DC00048332', 'Annual Disclosure Certification for COI Discloser 2021', '3/23/2021 1:51 PM', 'Review Complete: Preparing Correspondence' (circled in red), 'Pitt DeptChair', 'Pitt Supervisor', and 'Not Eligible'. At the bottom, it says '1 items' and 'page 1 of 1'.

## Submitting your Review

After you click on the form, you will be taken to the discloser’s summary page. You will have a menu of options on the left. Click **Prepare and Send Correspondence**.

The screenshot shows the disclosure summary page. At the top, there are tabs: 'My Disclosures', 'Reports', and 'Help Center'. Below the tabs, there's a 'Review Complete: Preparing Correspondence' badge. A 'NEXT STEPS' section has buttons: 'View Disclosures', 'Print/Forward', and 'Prepare and Send Correspondence' (circled in red). Below this are links for 'Manage Secondary Reviews', 'Notify Secondary Reviewers', and 'Reassign Primary Supervisor'. The main area shows 'Type: Annual Certification | ID: DC00048332' and 'Discloser: COI Discloser | Supervisor: Pitt DeptChair'. A workflow diagram shows 'Draft' -> 'In Review' -> 'Under Mgmt Plan' -> 'Complete'. Below this is a 'Secondary Reviews' section with a message: 'The secondary review(s) must be completed before the Primary Supervisor review can be finalized. Primary Supervisor can contact the secondary reviewer by using the "Notify Secondary Reviewers" activity on the left.' A table lists secondary reviews with columns: Person, Req'd, Accepted, Comments, and Docs. The first row shows 'Pitt Supervisor', 'yes', 'yes', and empty cells for 'Comments' and 'Docs'. At the bottom, there's a 'Summary' tab selected, showing a message: 'Your COI disclosure has been submitted and is currently under review.' and a 'Management plan: Snapshot: Date submitted: 3/23/2021'.

When you click this option, a new window will open with a draft of the email that will be sent to the discloser. The email will include the comments you added to your supervisor review in MyDisclosures.

**Instructions**

- This form allows you to create the letter with the decision.
- A default correspondence letter is shown below with information merged in from this disclosure certification. Edit the text of the letter as necessary.

Approval Template: Prepare Letter: Approve with Comments Refresh

University of Pittsburgh-UPMC  
MyDisclosures Application

To:	COI Discloser
Subject:	DEPARTMENT REVIEW: APPROVED WITH COMMENTS
Link:	<a href="#">Annual Disclosure Certification for COI Discloser 2021</a>

Pitt DeptChair has approved of your disclosure with the following comments:

After reviewing the message, scroll down to the bottom of the page.

Under **Correspondence Options** indicate whether you are ready to submit your review to the discloser or if you want to save and return to the activity later.

Once you select the **Complete** option and click **OK**, the form will be routed back to the discloser and your review is complete. The form will now have the Review Complete status.

#### Instructions for Sending Correspondence:

- This certification was reviewed and the determination was: Approve with Comments
- Select an option for correspondence below.

#### Correspondence Options:

- ☐ Select "Complete" and Click the OK button to complete the review and send correspondence to the discloser.
- ☐ Select "Save for Later" and Click the OK button to save this review for completion at a later time.

[Clear](#)

OK

Cancel