Navigating MyDisclosures

Instructions for Pitt Primary Supervisors Reviewing Disclosure Forms

MyDisclosures is an electronic conflict disclosure system that is designed to simplify and modernize conflict disclosure for Pitt and UPMC personnel, including disclosure of conflicts of commitment and financial conflicts of interest (COI). It conforms with Pitt’s Conflict of Interest Policy for Research, federal funding requirements, UPMC policies (for UPMC disclosers), and other relevant Pitt policies.

Pitt policy RI01 requires review by the discloser’s supervisor to identify any potential conflicts of commitment or unmanaged conflicts of interest. MyDisclosures enables supervisors to review disclosure forms electronically.

This document will provide you with the basic tools to review conflict disclosure forms as the Primary Supervisor. For information about what to look for when reviewing disclosure forms, please visit the COI website for help guides, training and more information.

Need Assistance?

For help guides, FAQs and information about disclosures, please visit the COI Website. If you need further assistance, please contact MyDisclosures_support@pitt.edu.

MyDisclosures Navigation Tips

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>?</td>
<td>Displays a pop-up window with help text</td>
</tr>
<tr>
<td>Save or Continue</td>
<td>Saves information</td>
</tr>
<tr>
<td>Exit</td>
<td>Leave the page and return to main workspace</td>
</tr>
<tr>
<td>*</td>
<td>Required Field</td>
</tr>
<tr>
<td>jumpTo</td>
<td>Click the down arrow to view a specific page</td>
</tr>
<tr>
<td>Hide/Show Errors</td>
<td>Identify missing required information. Incomplete pages will be listed at the bottom of the page.</td>
</tr>
</tbody>
</table>
Types of Supervisor Review

Primary Supervisor

For Faculty – The Primary Supervisor is the Department Chair, Division Chief or equivalent faculty supervisor from the discloser’s department who completes their annual performance evaluation.

For Staff – The Primary Supervisor is the person who completes their annual performance evaluation.

Primary supervisors will receive automatic email notifications weekly if annual disclosure forms are awaiting their review. An individual’s annual disclosure requirement will not be fulfilled until their Primary Supervisor’s review is submitted.

Secondary Supervisor

If a discloser has another supervisor that should review their disclosure form, they should list that person as their Secondary Supervisor. For example, if the discloser works in one of Pitt’s centers or institutes, such as the Aging Institute or Hillman Cancer Center, the discloser may need to list the director of the center as their Secondary Supervisor. The discloser can add as many Secondary Supervisors as necessary if they are appointed in more than one Center or Institute.

Not all disclosers will have a Secondary Supervisor. For those that do, the Secondary Supervisor’s review must be submitted before the Primary Supervisor submits their review.

All supervisors must have a Pitt appointment or affiliation. UPMC-only employees cannot be listed as a Primary or Secondary Supervisor on a discloser’s form.

Form Status

Draft - Disclosure that has not yet been submitted

No Interests Disclosed – Pitt or dual employee’s disclosure with no outside interests reported; submitted by the discloser and awaiting Pitt supervisor review; you may batch approve items with this status

Department Review – Pitt or dual employee’s disclosure with outside interests reported; submitted by discloser and awaiting Pitt supervisor review; these forms must be reviewed individually

Review Complete – Pitt or dual employee’s disclosure that is approved by supervisor

Submitted – UPMC-only employee’s submitted disclosure; does not require supervisor review in MyDisclosures
Login

⇒ Click the link in the email you received or go to 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).

Navigating to the Supervisor Center

When you log in to MyDisclosures, you will land at your Inbox. Your Inbox is where you will find your own annual disclosure form to complete. For instructions on how to complete your disclosure form, visit the COI website.

To review disclosure forms on which you are listed as a supervisor, click on the Supervisor Center tab at the top of the page. All forms requiring your review will appear in the Supervisor Center.
Supervisor Center

The Supervisor Center contains all forms requiring your review. Four tabs are available for you.

Action Items
All disclosure forms requiring your attention as Primary or Secondary Supervisor will be listed in the Action Items tab of the Supervisor Center.

In Progress
All disclosure forms awaiting action by the discloser or a response from the COI Division will appear under this tab.

Reviewed Items
All disclosure forms you approved will appear under this tab.

Secondary Supervisor Items
All disclosure forms on which you are listed as Secondary Supervisor that are in 1) No Interests Disclosed status or 2) Review Complete status. You do not need to take any action with the forms in this tab.

Additional Supervisor Resources
Links to help guides and resources are in the menu on the left.
Reviewing Forms with No Interests Disclosed

If a discloser reports no outside interests on their form, it will appear under your Action Items tab with a status listed as No Interests Disclosed. You may batch approve any forms in this state.

If you think a discloser made a mistake and should have reported outside interest on their form, you should return the form to the discloser (see instructions below).

To approve all forms listed as No Interests Disclosed, check the Select All Batchable Items box on the right. Then click the Batch Approve Selected No Interests Disclosed Certifications.

After clicking this option, a new window will open. You will see a list of all disclosers for whom you are listed as Primary Supervisor and who did not report any outside interests on their form. To batch approve the forms for all disclosers on your list, click OK at the bottom right of the screen.

Once you click OK, the status of all forms on the list will change to Review Complete. This may take several minutes, depending on the number of disclosures in your list.

Note: If you are both a Primary and a Secondary Supervisor, please note that when you click “Batch- Approve Certifications in “No Interests Disclosed State” from your Action Items tab, it will only apply to forms for which you are listed as the Primary Supervisor.
Viewing Comments from Secondary Supervisor on No Interests Disclosed Forms

You may receive an email from MyDisclosures informing you that a Secondary Supervisor has left a comment on a disclosure form. Click the link in the email to go to MyDisclosures and view the form. You can view the Secondary Supervisor’s comments by clicking the History Tab on the discloser’s form.

If you review the Secondary Supervisor’s comments and believe the Discloser should make changes to their form, please select **Change to Department Review** from the menu on the left. This will enable you to send the form back to the discloser for correction using the instructions below.

Reviewing Forms with Interests Disclosed

Disclosure forms for Pitt or dual employees who reported at least one outside interest will appear in the **Supervisor Center** in the **Action Items** tab. They will be listed in the **Department Review** status. You cannot batch approve forms in this status.

Click on the form you want to review from the list.
When you click on a form, you will be taken to a summary page that includes a menu with actions you can take, the name of the discloser’s Secondary Supervisor, if any, and a summary of outside interests the discloser reported.

The summary page includes a status of each interest on the discloser’s form:

- **“Review Complete”** means the interest was reported by the discloser and reviewed and approved by the supervisor.
- **“Under Modification”** means the interest was reported by the discloser and is awaiting review by the supervisor; the entry will remain in this status until the supervisor approves the disclosure, at which time it will change to “Review Complete”.
- **“Pending Removal”** means the discloser has removed the interest from the form; the entry will remain on the form and in this status until the supervisor approves the disclosure, at which time it will be removed from the form.

To view all details reported on the form, click in the menu on the left.
**Institutional Responsibilities**

On the first page of the form, disclosers must identify their institutional affiliations, their supervisor(s), and indicate whether they receive funding from a PHS agency for their research.

The discloser’s answers to the questions on this page determine what questions appear on the discloser’s form. **Verify that the information the discloser reported is correct.**

If the discloser’s responses to the questions on this page are incorrect, return the form to the discloser by selecting the **Supervisor Requests Changes from the Discloser** option as your response (see instructions below).

**What to Disclose**

The next page of the discloser’s form summarizes what they are required to report, which is based on their responses on the previous page.

In general, disclosers must report any outside activities, interests, and relationships, regardless of dollar value, that they or a member of their immediate family have, that:

- Might be reasonably perceived to be related to their institutional responsibilities;
- Relate to the University’s educational, research, service, or other missions, including services offered by the University; or
- May otherwise create a conflict of interest or commitment, or the perception of such a conflict, with their duties to the University.
**Reviewing Disclosure Details**

After the *What to Disclose* page, you will be shown a summary of the discloser’s outside interests. Review the summary on the page or click *View* to the left of the interest to see more details about the disclosure.

**Not all disclosers will be required to report the financial value of their interest.** The disclosure threshold depends on the discloser’s institutional affiliations, roles and PHS funding.

Use the **Back** and **Continue** buttons at the top or bottom of your screen to advance or return to pages on the disclosure form.

**For all reported outside activities:**

- Ensure that you gave the discloser prior approval to engage in the activity;
- Ensure that the activities do not give rise to an unmanaged conflict of interest;
- Ensure that the disclosed interests do not give rise to a conflict of commitment

**Visit the COI website** for more information about identifying unmanaged conflicts.
**Submitting a Review**

After reviewing a form, you can:
- Approve the disclosure;
- Approve with additional comments;
- Request assistance from the COI Division; or
- Ask the discloser to make changes to their form.

1. To approve a disclosure or request assistance from the COI division, click **Record and Complete Department Review** from the menu on the left of the summary page.
2. To ask the discloser to make changes click **Supervisor Requests Changes from Discloser** from the menu on the left of the summary page.

**Approve a Disclosure**

If you approve of the disclosure and no changes are required, select **Approve**, then click **OK**. The form status will change to **Review Complete** and will be located in the **Reviewed Items** tab of your **Supervisor Center**.
Approve a Disclosure with a Comments

Please note that selecting Approve with Comment option does not require the discloser to make changes to their form. If you want the discloser to make changes before you approve the form, do not select this option. Instead click “Cancel” and choose “Supervisor Requests Changes from Discloser” from the menu on the left. (See instructions below.)

If you accept the disclosure, but want to add comments for the discloser, select Approve with Comments, then click OK. A text box will appear for you to enter your comments for the discloser. After clicking OK you will return to the summary page. Your menu of options for the discloser will have changed. Click the new option Prepare and Send Correspondence.
A new window will open with a draft of the email that will be sent to the discloser. You can revise the email and add more comments, if desired.

Once you are satisfied that all of the necessary information is included in the email, 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 later. Once you select the **Complete** option and click **OK**, the form will be sent back to the discloser.
Request Assistance from the COI Office

For assistance with the disclosure, select Request Assistance from COI Office, then click OK. The form status will change to Administrative Review and will be sent to the COI Division for review. Someone from the COI Division will contact you to confirm receipt of your request. The discloser will not be notified that you have requested assistance from the COI Division.

After the COI Division has reviewed and provided any support or feedback, you must submit your review of the discloser’s form by Approving, Approving with Comment or Requesting Changes.
Returning a Form to Discloser for Changes

Select **Supervisor Requests Changes from the Discloser** if you want the discloser to make changes to their form before you approve it.

When you select this option, a new window will open. Describe the changes you want the discloser to make to their form in the text box, then click **OK**.

The form will change to the status **Department Review: Pending Response** and will be sent back to the discloser’s inbox. The discloser will receive an email from MyDisclosures instructing them to login and submit updates to their form.

When the discloser re-submits their form, it will be available for you under the Action Items tab in the Supervisor Center again. Review the form and approve, approve with comment, request assistance from the COI Division or request more changes from the discloser.
**Reassign Primary Supervisor**

Each discloser’s Primary Supervisor should be pre-populated for them in the system. In the event you are incorrectly listed as the Primary Supervisor for a discloser, you or the discloser can identify the correct Primary Supervisor. Return the form to the discloser for correction by selecting **Supervisor Requests Changes from the Discloser** (see instructions above) or directly identify the correct supervisor by using the **Reassign Primary Supervisor** function.

To identify a different person as a discloser’s Primary Supervisor, select the **Reassign Primary Supervisor** from the menu on the left.

When you select this option, a new window will open. Type in the name of the correct Primary Supervisor and select their name from the list. Add any additional comments, if desired.

Click **OK** at the bottom of the window to finalize the reassignment of the discloser’s Primary Supervisor. After you click **OK** the discloser’s form will be removed from your **Supervisor Center**.
**Notifying Secondary Supervisors**

If a discloser reports outside interests on their form and has a Secondary Supervisor, the Secondary Supervisor’s review must be submitted before you can submit yours. Primary Supervisors who try to submit their review before an assigned Secondary Supervisor has submitted their review will receive an error message.

You can determine whether a Secondary Supervisor has submitted their review by checking the **Accepted** column in the Secondary Supervisor information on the discloser’s summary page. If it says **Yes**, then the Secondary Supervisor’s review is complete. If it is blank, the Secondary Supervisor’s review has not yet been submitted.

If you are a Primary Supervisor and you are awaiting a Secondary Supervisor’s review, you can notify the Secondary Supervisor that you require their response by selecting **Notify Secondary Reviewers** from the menu on the left.

Once you click this option, a new window will open. First, click the box under question 1. Next, enter a message to the secondary reviewer under question 2. To send the notification to the secondary reviewer, click **OK** at the bottom of the window.

Note that Secondary Supervisors are not automatically notified when a discloser submits changes to their form. **Outside of the annual disclosure period, please use this feature to notify the Secondary Supervisor that their review is required.**