

## Navigating MyDisclosures

### *Instructions for Pitt Primary Supervisors Reviewing Disclosure Forms*

**MyDisclosures** is the University's electronic conflict disclosure system. It conforms with the University's Conflict of Interest Policy for Research, federal funding requirements, UPMC policies (for UPMC disclosers), and other relevant University policies.


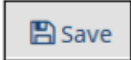
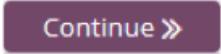
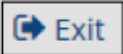

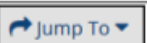
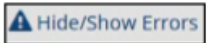
Pitt policy RI01 requires review by the discloser's supervisor to identify any potential conflicts of commitment or unmanaged conflicts of interest. MyDisclosures enables supervisors to review disclosure forms electronically.

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](mailto:MyDisclosures_support@pitt.edu).

#### MyDisclosures Navigation Tips

	Displays a pop-up window with help text
 or 	Saves information
	Leave the page and return to main workspace
	Required Field
	Click the down arrow to view a specific page
	Identify missing required information. Incomplete pages will be listed at the bottom of the page.

## Types of Supervisor Review

### *Primary Supervisor*

For Faculty – The Primary Supervisor is the Department Chair, Division Chief or equivalent faculty supervisor 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](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).

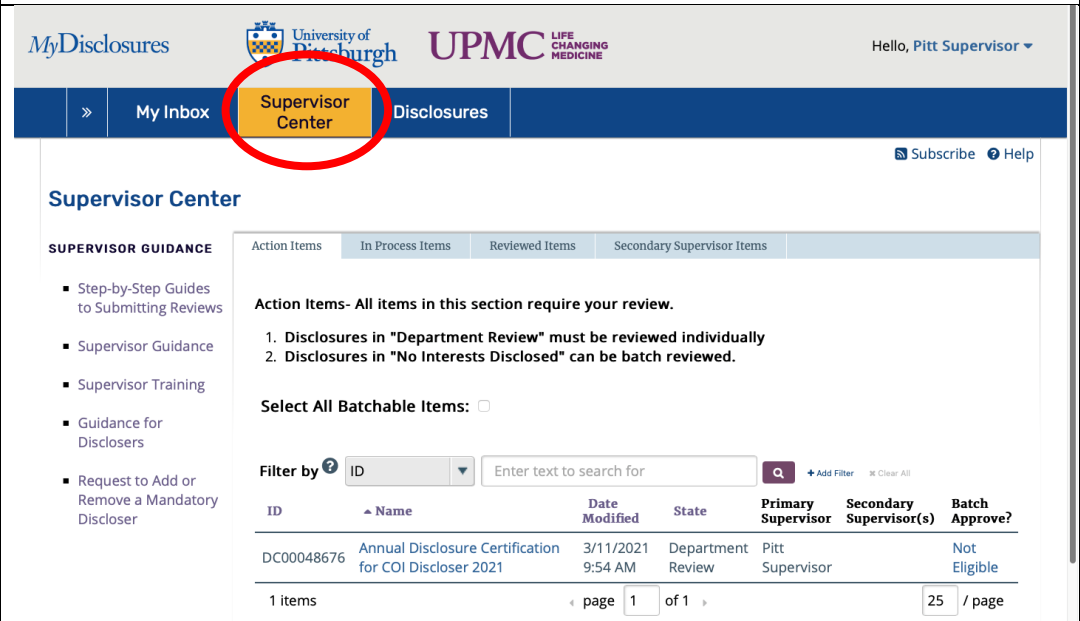
UPMC Employees should contact the UPMC Help Desk at (412) 647-HELP (4357).



## 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**

**SUPERVISOR GUIDANCE**

- Step-by-Step Guides to Submitting Reviews
- Supervisor Guidance
- Supervisor Training
- Guidance for Disclosers
- Request to Add or Remove a Mandatory Discloser

**Action Items** | In Process Items | Reviewed Items | Secondary Supervisor Items

**Action Items- All items in this section require your review.**

- Disclosures in "Department Review" must be reviewed individually
- Disclosures in "No Interests Disclosed" can be batch reviewed.

Select All Batchable Items: ☐

Filter by <sup>?</sup> ID  Enter text to search for

ID	Name	Date Modified	State	Primary Supervisor	Secondary Supervisor(s)	Batch Approve?
DC00048676	Annual Disclosure Certification for COI Discloser 2021	3/11/2021 9:54 AM	Department Review	Pitt Supervisor		Not Eligible

1 items page 1 of 1 25 / page

## 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.

MyDisclosures University of Pittsburgh UPMC LIFE CHANGING MEDICINE Hello, Pitt Supervisor ▾

» My Inbox Supervisor Center Disclosures

Subscribe Help

### Supervisor Center

**SUPERVISOR GUIDANCE** Action Items In Process Items Reviewed Items Secondary Supervisor Items

- Step-by-Step Guides to Submitting Reviews
- Supervisor Guidance
- Supervisor Training
- Guidance for Disclosers
- Request to Add or Remove a Mandatory Discloser

**Action Items- All items in this section require your review.**

- Disclosures in "Department Review" must be reviewed individually
- Disclosures in "No Interests Disclosed" can be batch reviewed.

Select All Batchable Items: ☐

Filter by ID Enter text to search for

ID	Name	Date Modified	State	Primary Supervisor	Secondary Supervisor(s)	Batch Approve?
DC00048676	Annual Disclosure Certification for COI Discloser 2021	3/11/2021 9:54 AM	Department Review	Pitt Supervisor		Not Eligible

1 items   / page

## 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.

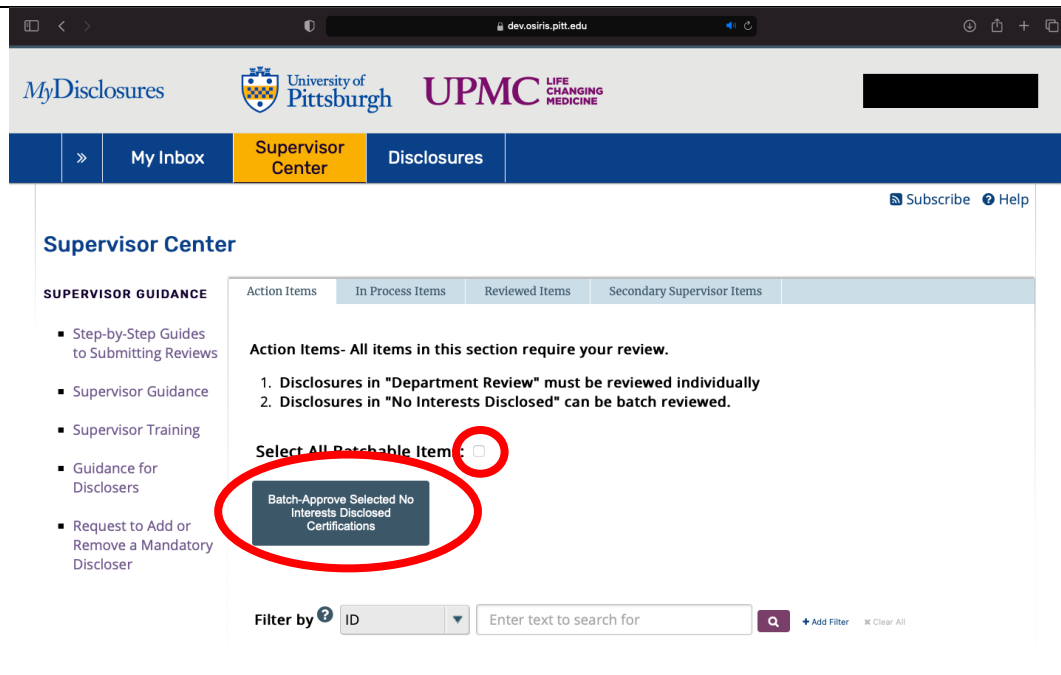
If you think a discloser made a mistake and should have reported outside interest on their form, you should return the form to the discloser (*see instructions below*).

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.



The screenshot shows the MyDisclosures Supervisor Center interface. The top navigation bar includes the University of Pittsburgh and UPMC logos. The main content 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 list of items that require review. A red circle highlights the "Select All Batchable Items" checkbox, which is currently unchecked. Below this, a button labeled "Batch-Approve Selected No Interests Disclosed Certifications" is also circled in red. The interface includes a search bar and a filter dropdown.

**Batch Approve No Interests Disclosed**

As the Department Reviewer / Supervisor, I have reviewed the Certifications in the Report here and have taken any appropriate actions surrounding those Certifications that are not to be batch approved, e.g. requested changes from the discloser, etc.

Click "OK" to log an "Approved" Departmental Determination on all Certifications in the Report below and transition those Certifications to the state of "Review Complete".

Report: All Certifications in "No Interests Disclosed" State

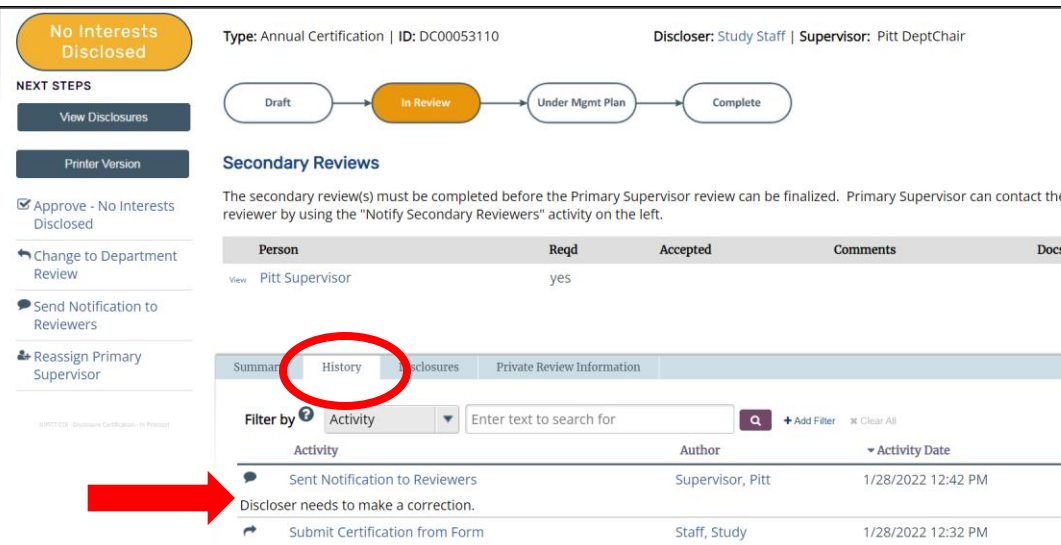
ID	Name	Discloser (First)	Discloser (Last)	Affiliation	Date Submitted	Date Modified
DC00048679	Annual Disclosure Certification for [REDACTED]	[REDACTED]	[REDACTED]	PITT Employed	3/11/2021	3/11/2021 3:07 PM

At the bottom right of the screen, there are two buttons: "OK" and "Cancel". The "OK" button is circled in red.

## 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.



**No Interests Disclosed**

Type: Annual Certification | ID: DC00053110 | Discloser: Study Staff | Supervisor: Pitt Dept Chair

**NEXT STEPS**

- View Disclosures
- Printer Version
- Approve - No Interests Disclosed
- Change to Department Review
- Send Notification to Reviewers
- Reassign Primary Supervisor

**Secondary Reviews**

The secondary review(s) must be completed before the Primary Supervisor review can be finalized. Primary Supervisor can contact the reviewer by using the "Notify Secondary Reviewers" activity on the left.

Person	Reqd	Accepted	Comments	Doc
Pitt Supervisor	yes			

**History**

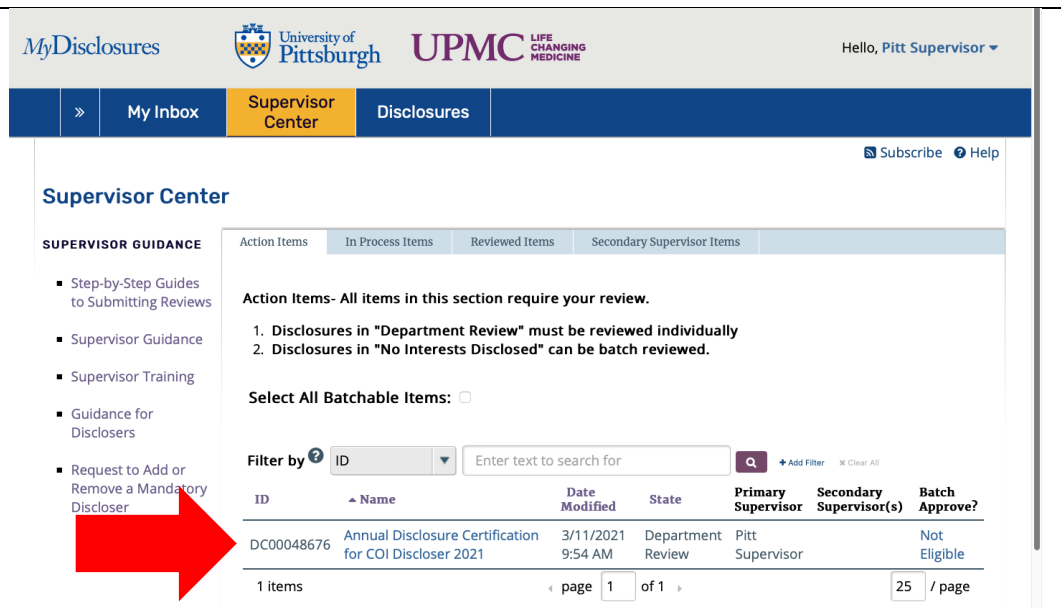
Filter by: Activity

Activity	Author	Activity Date
Sent Notification to Reviewers	Supervisor, Pitt	1/28/2022 12:42 PM
Submit Certification from Form	Staff, Study	1/28/2022 12:32 PM

## 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.



MyDisclosures | University of Pittsburgh | UPMC | LIFE CHANGING MEDICINE

Hello, Pitt Supervisor

**Supervisor Center**

**SUPERVISOR GUIDANCE**

- Step-by-Step Guides to Submitting Reviews
- Supervisor Guidance
- Supervisor Training
- Guidance for Disclosers
- Request to Add or Remove a Mandatory Discloser

**Action Items**

**Action Items- All items in this section require your review.**

- Disclosures in "Department Review" must be reviewed individually
- Disclosures in "No Interests Disclosed" can be batch reviewed.

Select All Batchable Items: ☐

Filter by: ID

ID	Name	Date Modified	State	Primary Supervisor	Secondary Supervisor(s)	Batch Approve?
DC00048676	Annual Disclosure Certification for COI Discloser 2021	3/11/2021 9:54 AM	Department Review	Pitt Supervisor		Not Eligible

1 items | page 1 of 1 | 25 / page

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

View Disclosures

in the menu on the left.

MyDisclosures
University of Pittsburgh
UPMC
LIFE CHANGING MEDICINE
Hello, Pitt Supervisor

My Inbox
Supervisor Center
Disclosures

My Disclosures
Reports
Help Center

Department Review
View Disclosures
Printer Version
Record and Complete Department Review
Supervisor Requests Changes from Discloser
Manage Secondary Reviews
Notify Secondary Reviewers

Type: Annual Certification | ID: DC00048676
Discloser: COI Discloser | Supervisor: Pitt Supervisor

Draft
In Review
Under Mgmt Plan
Complete

Secondary Reviews
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.

Person
Reqd
Accepted
Comments
Docs
There are no items to display

Summary
History
Disclosures
Private Review Information

plan: Snapshot:
Date submitted: 3/11/2021
Needs review: Yes
MY DISCLOSURES

Export

Organization	Relationships	Disclosure Types	Total Value	Total Days	Last Updated	CMP in Place?	Status
Abbott Laboratories	Self	Consulting and Other Professional Services (including but not limited to advisory, speaking, employee, independent contractor, editorial and expert witness services)	\$7,500.00	6	3/11/2021 12:54 PM	no	Pending Removal

DISCLOSER ADDL INFO

Outside Employment	Other Academic Appointments or Affiliations	Research Support
No	No	No

OCI	University Relationships	Party to University Transaction
No	No	No




## 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).

MyDisclosures

 University of Pittsburgh

 UPMC LIFE CHANGING MEDICINE

Edit: Disclosure Certification - DC00048676

You Are Here: Annual Disclosure Certification...

[Back](#) [Save](#) [Exit](#) [Hide/Show Errors](#) [Print](#) [Jump To](#) [Continue](#)

### Annual Certification for COI Discloser : Institutional Responsibilities

- \* Identify your employer(s) and where you do research (check ALL that apply):**

☒ PITT Faculty or Researcher

☐ PITT Administrative/Purchasing Role

☐ UPMC
- Your supervisor who will approve this disclosure:**

Pitt Supervisor

*If this is not the supervisor who completes your annual performance review, select the appropriate supervisor by clicking the button below.*

Update Primary Supervisor
- Please select your secondary supervisor(s), if applicable:**

### Annual Certification for Discloser : What to Disclose

Completing this Certification satisfies the disclosure requirements of the University of Pittsburgh's (Pitt) policies governing conflicts of interest. You must disclose any interests or relationships that give rise to an actual or potential conflict of interest, so they can be evaluated and, if necessary, managed.

You must disclose any ownership interest or business relationship with an entity that you know does business with Pitt.

If you know that a member of your family has benefited financially, or will likely benefit financially, from a particular transaction with Pitt, you must disclose those interests. Include interests held by your spouse or domestic partner, children, siblings, and parents, including in-laws and step-relatives.

However, you are not required to disclose:

- Salary, reimbursements, bonuses, or incentives from the University of Pittsburgh, UPMC, UPMC physician entities, or the Veterans' Administration Pittsburgh Healthcare System;
- Income from and ownership interests in investment vehicles, such as mutual funds and retirement accounts, in which you do not directly control the investment decisions;
- Ownership of any publicly traded company (i.e.: companies with stock that is listed on any recognized stock exchange), where the amount of your ownership interest is less than 5% of the total stock of the company

**What is the relevant time period for disclosures?**

You should disclose the interests and relationships you had during the last 12 months, and those that you reasonably anticipate having in the next 12 months.

You must submit a Certification annually, even if you do not have any changes or new interests to report. Pitt policy requires that you update your Certification within 30 days of acquiring or discovering a new reportable interest or relationship. You can access and update your form at any time during the year.

**If you are removing all outside interests from your form, you must keep "Yes" selected on this page and click "Continue". You will be taken to the Disclosure Details page where you can remove the entries using the "X" next to the interest. Once you remove the interest, use the "Back" button to return to this page and change your answer below to "No".**

- \* Do you have any outside interests, activities, or relationships, foreign or domestic, to report?**

☒ Yes ☐ No [Clear](#)
- \* Does an immediate family member have a relationship with an outside entity, foreign or domestic, that relates to your institutional responsibilities?**

☐ Yes ☒ No [Clear](#)

## What to Disclose

The next page of the discloser's form summarizes what they are required to report.

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.

## Annual Certification for Maricela Simms (PI88) : Disclosure Details

Please enter the outside interests, activities and relationships you need to report for you and any members of your immediate family on this page.

- If the relationship has not previously been disclosed, click on the "Add Disclosure" button.
- If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure listed in the "Previously reviewed disclosures" (#2 below) to update.
- If the relationship is no longer active (e.g., a consulting relationship or board position that ended), click on the "Remove" link to the right of the disclosure.

### 1. Disclosures under review:

View/Edit	Organization	Relationships	Disclosure Types	Total Value	Total Days	Last Updated	Remove
<a href="#">View</a>	PharmaCo, Inc.	Self	Consulting and Other Professional Services (including but not limited to advisory, speaking, employee, independent contractor, editorial and expert witness services)	\$0.00	5	5/27/2020 1:47 PM	
<a href="#">View</a>	Industry Corp.	Self	Consulting and Other Professional Services (including but not limited to advisory, speaking, employee, independent contractor, editorial and expert witness services)	\$0.00	150	5/27/2020 1:47 PM	

### 2. Previously reviewed disclosures: (click 'Modify' to enable editing)

Modify	View	Organization	Relationships	Disclosure Types	Total Value	Total Days	Last Updated	Remove
There are no items to display								

## 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.

The screenshot shows the MyDisclosures interface for a Primary Supervisor. The top navigation bar includes the MyDisclosures logo, University of Pittsburgh and UPMC logos, and a user greeting "Hello, Pitt Super". The main navigation menu has tabs for "My Inbox", "Supervisor Center", and "Disclosures". Below this is a secondary menu with "My Disclosures", "Reports", and "Help Center".

The main content area displays a "Department Review" section. It includes a "NEXT STEPS" section with buttons for "View Disclosures" and "Printer Version". A workflow diagram shows the process: Draft → In Review → Under Mgmt Plan → Complete. The "In Review" step is currently active.

Below the workflow, there is a "Secondary Reviews" section. It contains a table with columns: Person, Req'd, Accepted, Comments, and Docs. The table is currently empty, with the message "There are no items to display".

On the left side of the interface, there is a sidebar menu. Two items are highlighted with red boxes and numbered: 1. "Record and Complete Department Review" and 2. "Supervisor Requests Changes from Discloser".

## Approve a Disclosure

If you approve 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**.

The screenshot shows the "Record and Complete Department Review" form. The title is "Record and Complete Department Review". Below the title, there is a paragraph of instructions: "Please record your review of the disclosure certification and your conclusion. If you want the discloser to make changes to their form, do not use this option. Instead click **Cancel** below and choose 'Supervisor Requests Changes from Discloser' from the menu on the left."

The form has two main sections:

1. **Departmental Determination:** This section contains three radio button options: "Approve", "Approve with Comments", and "Request Assistance from COI Office". The "Approve" option is selected and circled in red. Below these options is a "Clear" link.
2. **Related Attachments:** This section contains an "Add" button and a table with a column labeled "Name". The table is currently empty, with the message "There are no items to display".

At the bottom right of the form, there are two buttons: "OK" and "Cancel". The "OK" button is circled in red.

## 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**.

**Record and Complete Department Review**

Please record your review of the disclosure certification and your conclusion. If you want the discloser to make changes to their form, do not use this option. Instead click **Cancel** below and choose “**Supervisor Requests Changes from Discloser**” from the menu on the left.

1. **Departmental Determination:**

- ☐ Approve
- ☒ **Approve with Comments**
- ☐ Request Changes from COI Office

[Clear](#)

2. **Related Attachments:**

[+ Add](#)

Name

There are no items to display

[OK](#) [Cancel](#)

[View Disclosures](#)

[Printer Version](#)

[Prepare and Send Correspondence](#)

[Manage Secondary Reviews](#)

[Notify Secondary Reviewers](#)

[Reassign Primary Supervisor](#)

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.

**Prepare and Send Correspondence**

**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.

Approval Template: Prepare Letter: Approve with Comments Refri

University of Pittsburgh-UPMC  
MyDisclosures Application

To: Maricela Simms (PI88)  
Subject: DEPARTMENT REVIEW: APPROVED WITH COMMENTS  
Link: Annual Disclosure Certification for Maricela Simms (PI88) 2020

Pitt4 Supervisor4 has approved of your disclosure with the following comments:  
Discloser must add outside interest with Company X

MyDisclosures  
Application: [www.mydisclosures.pitt.edu](http://www.mydisclosures.pitt.edu)

PITT COI Office - Contact Email:  
[mydisclosures@pitt.edu](mailto:mydisclosures@pitt.edu)  
UPMC COI Office - Contact Email: [conflicts@upmc.edu](mailto:conflicts@upmc.edu)

**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](#)

## 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, the form will be returned to the Department Review status and it will appear in your Supervisor Center. You must submit your review of the discloser's form by **Approving**, **Approving with Comment** or **Requesting Changes**.

### Record and Complete Department Review

#### Record and Complete Department Review

Please record your review of the disclosure certification and your conclusion. If you want the discloser to make changes to their form, do not use this option. Instead click **Cancel** below and choose "**Supervisor Requests Changes from Discloser**" from the menu on the left.

1. **\* Departmental Determination:**

- ☐ Approve
- ☐ Approve with Comments
- ☐ Request Assistance from COI Office

2. **Related Attachments:**

+ Add

Name

There are no items to display

OK

Cancel

## 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.

### Supervisor Requests Changes from Discloser

When you submit this form, the discloser will be notified that changes are required to the disclosure certification application before you will approve it. Use the box below to add instructions or indicate the changes which you require.

#### 1. \* Comments about the changes:

Please add your relationship with Pfizer to your form.

#### 2. Attachments:

+ Add

Name	Description
------	-------------

There are no items to display

OK

Cancel

## 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**.

**No Interests Disclosed**

**Next Steps**

- View Disclosures
- Printer Version
- Approve - No Interests Disclosed
- Change to Department Review
- Send Notification to Reviewers
- Reassign Primary Supervisor**

**Secondary Reviews**

The secondary review(s) must be completed before the Primary S Supervisor can contact the secondary reviewer by using the "Noti

Person	Reqd	Accepted
There are no items to display		

Summary History Disclosures Private Review Information

Your COI disclosure has been submitted and is currently under

**Management plan:**

### Reassign Primary Supervisor

Please select the supervisor who will approve this disclosure:

The current supervisor is **Pitt Department**

1. \* New Supervisor: supervisor

2. Additional Comments

First Last	Email	Department
Pitt	Supervisor	Huron Consulting, Inc.
UPMC	Supervisor	Huron Consulting, Inc.

Clicking OK will reassign this supervisor. After doing so, please click on the 'My Inbox' tab to exit this disclosure.

OK Cancel



## 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.**

Department Review

NEXT STEPS

View Disclosures

Printer Version

Record and Complete Department Review

Supervisor Requests Changes from Discloser

Manage Secondary Reviews

Notify Secondary Reviewers

Reassign Primary Supervisor

Type: Annual Certification | ID: DC00053106

Discloser: Study Coordinator | Supervisor: Pitt DeptChair

Draft

In Review

Under Mgmt Plan

Complete

Secondary Reviews

The secondary review(s) must be completed before the Primary Supervisor review can be finalized. Primary Supervisor can reviewer by using the "Notify Secondary Reviewers" activity on the left.

Person	Reqd	Accepted	Comments
Pitt Supervisor	yes		

Summary

History

Disclosures

Private Review Information

Your COI disclosure has been submitted and is currently under review.

Notify Secondary Reviewers

1. \* Select secondary reviewers to notify:

Organization	Person	Review Type	Required
<input type="checkbox"/>	Pitt Supervisor	Department Review	yes

2. \* Message:

3. Supporting Documents:

Add

Name

There are no items to display

OK

Cancel