Navigating *My*Disclosures for Pitt and Dual (UPMC-Pitt) Employees
Instructions for Completing Annual Disclosure

***My*Disclosures** is a new electronic 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.

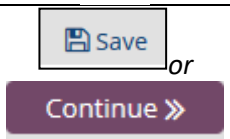
This document will provide you with the basic tools to create and update your annual conflict disclosure form.

Need help completing your form?

For technical support, including assistance with log-in and form access, contact the Pitt IT Help Desk at (412) 624-HELP (4357).

If you have questions about what information to include on your disclosure form, visit the COI website for a list of frequently asked questions and help guides. Help text on various topics is also provided for you throughout the *My*Disclosures system.

***My*Disclosures Navigation Key**

	Displays a pop-up window with help text
	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.

Login

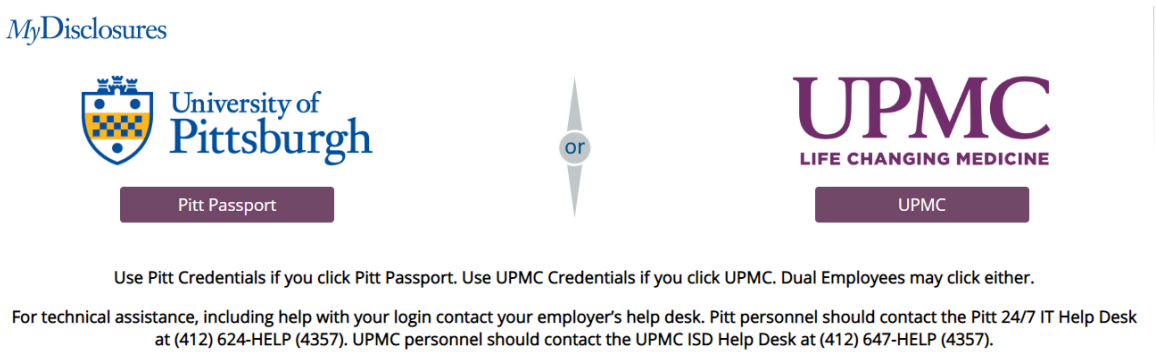
- Click the link in the email you received *or* go to www.mydisclosures.pitt.edu

- Click on either Pitt Passport or UPMC to access the form. *Choose the institution you are employed by for your log in. If you are dually employed, you may use either.*

- If you have trouble with your login:

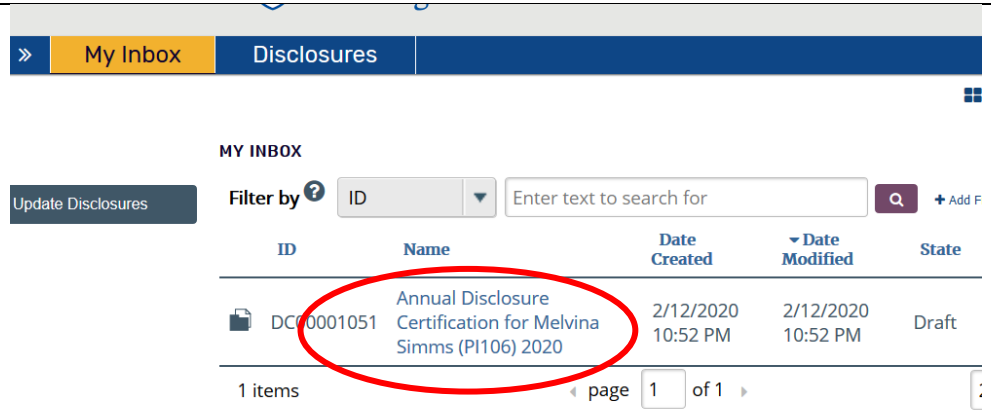
  Pitt employees should contact the Pitt IT Technology Help Desk 24/7 at **412-642-HELP (4357).**

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



Mandatory Annual Disclosure

- Your annual disclosure will be displayed in your **Inbox.** You can also access your form using the **Disclosures** tab. Click on the **Name** of the disclosure to open and edit your annual disclosure.

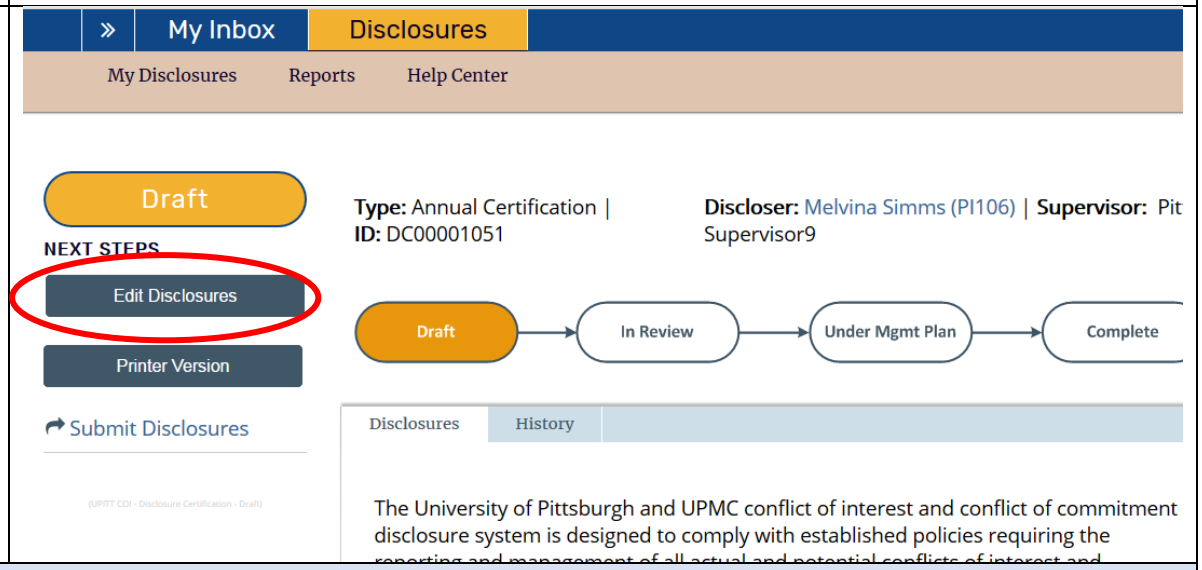


Completing the Form

- To start completing your form click

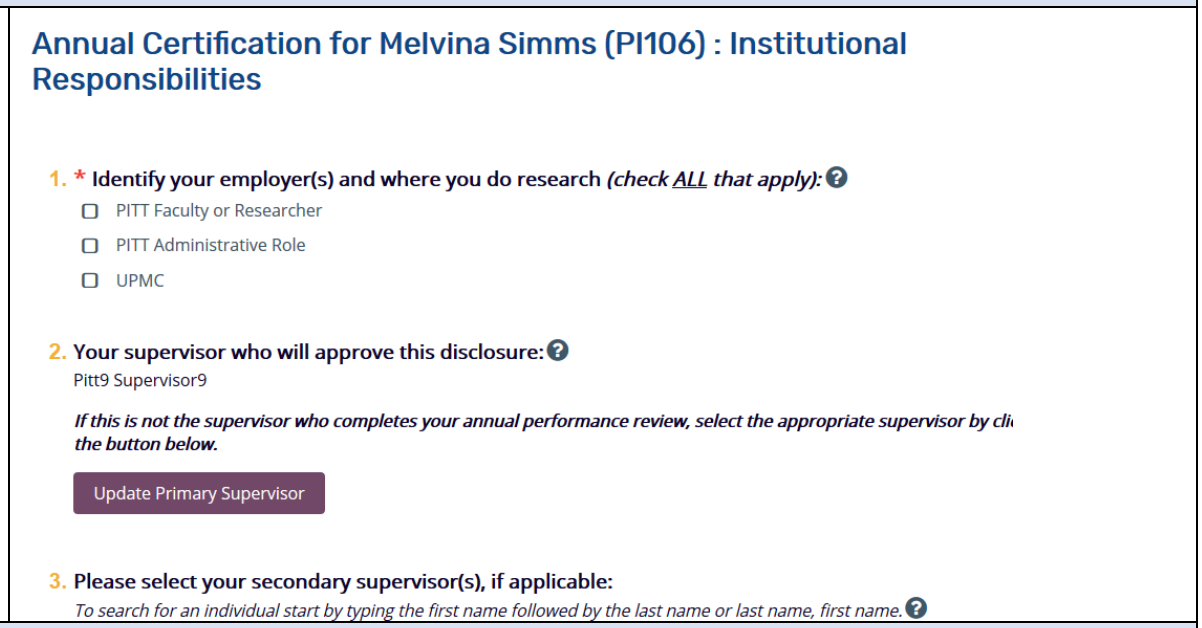
  Edit Disclosures

  on the left side of the page.



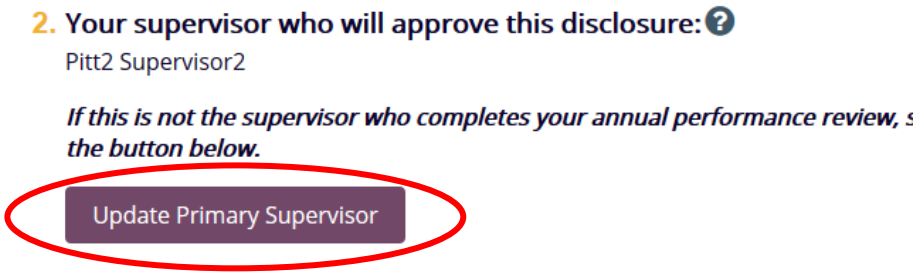
Institutional Responsibilities

Your answers on this page determine what questions will appear on your form and will identify the supervisor(s) who will review your disclosures.



Primary Supervisors

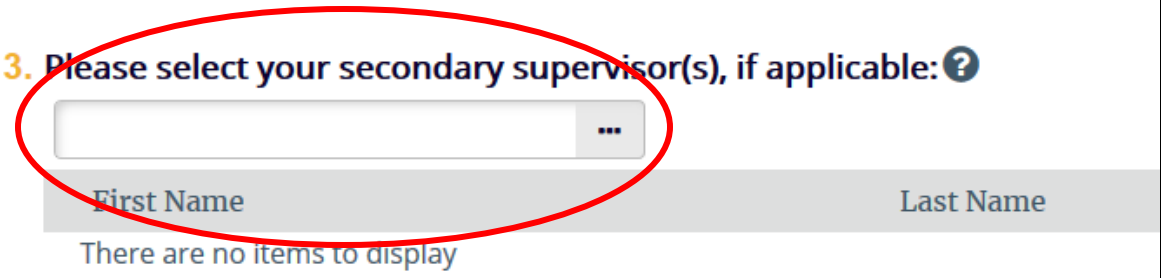
Your **Primary Supervisor** is automatically listed for you. **Verify** that the person listed as your Primary Supervisor is the person who completes your annual performance review. If the incorrect person is listed, click on **Update Primary Supervisor**. If you are unsure about who should be listed as your Primary Supervisor, contact your department chair or administrator for assistance.



Secondary Supervisors

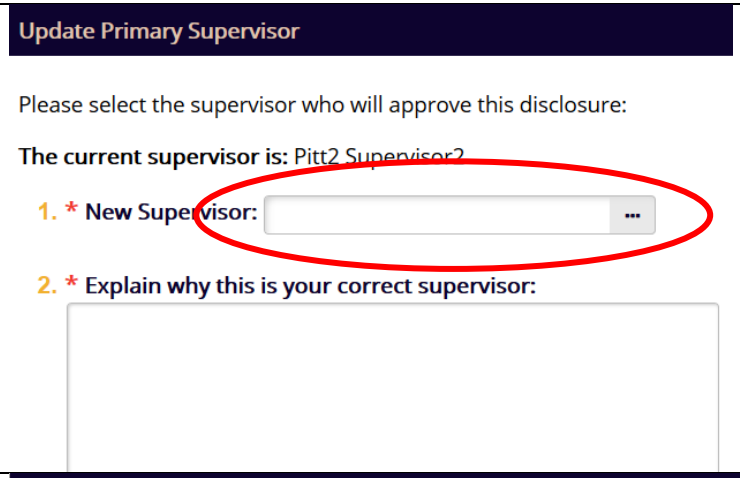
If, in addition to your Primary Supervisor, another person needs to review your disclosure, list them as your Secondary Supervisor. For example, if you belong to one of Pitt's centers or institutes (e.g.: McGowan Institute, Hillman Cancer Center), the director of the center may need to review your disclosures.

Not all disclosers will have a Secondary Supervisor.

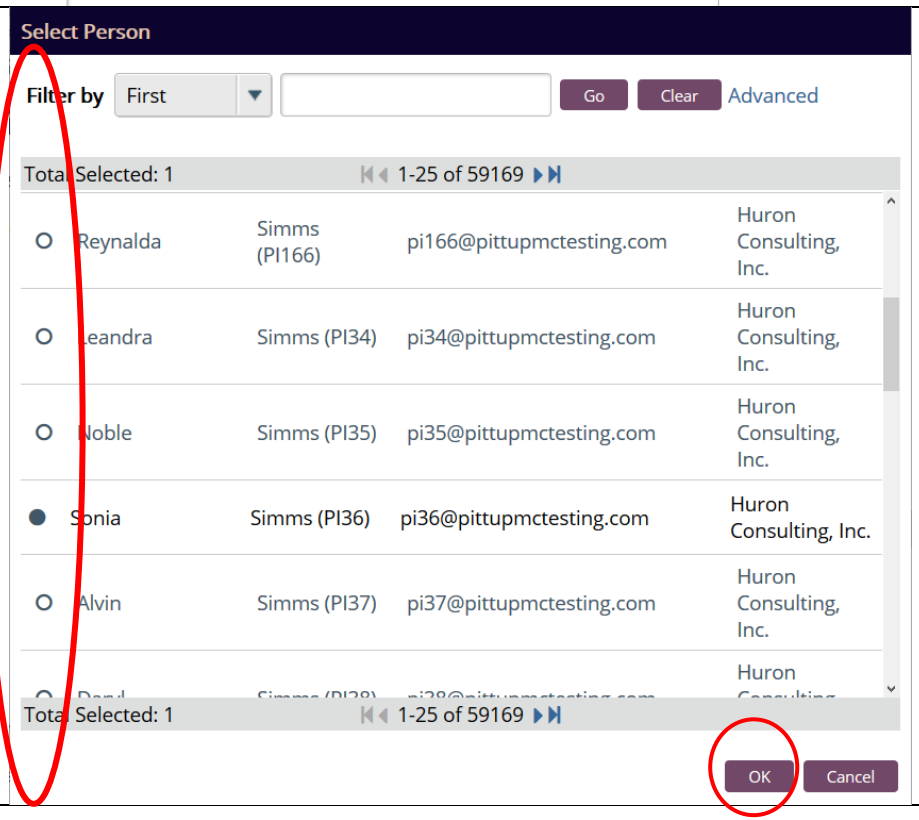


Update Supervisor Information

- To update your primary supervisor or to add a secondary supervisor, identify your supervisor by typing their **first name** followed by their **last name** into the search bar. You can also search by **last name, first name.**



- Select your supervisor by clicking the button next to their name. After making your selection click OK to save your information.



Disclosing Outside Interests, Relationships and Activities

What to Disclose

Please review this section carefully.

Report all outside activities, interests and relationships ***regardless of dollar value*** that:

- Might be reasonably percieved to be related to your 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 your duties to the University.

If you have additional questions about whether to disclose a particular interest, relationship or activity, vist the COI webpage for help guides and our list of FAQs.

Annual Certification for Melvina Simms (PI106) : What to Disclose

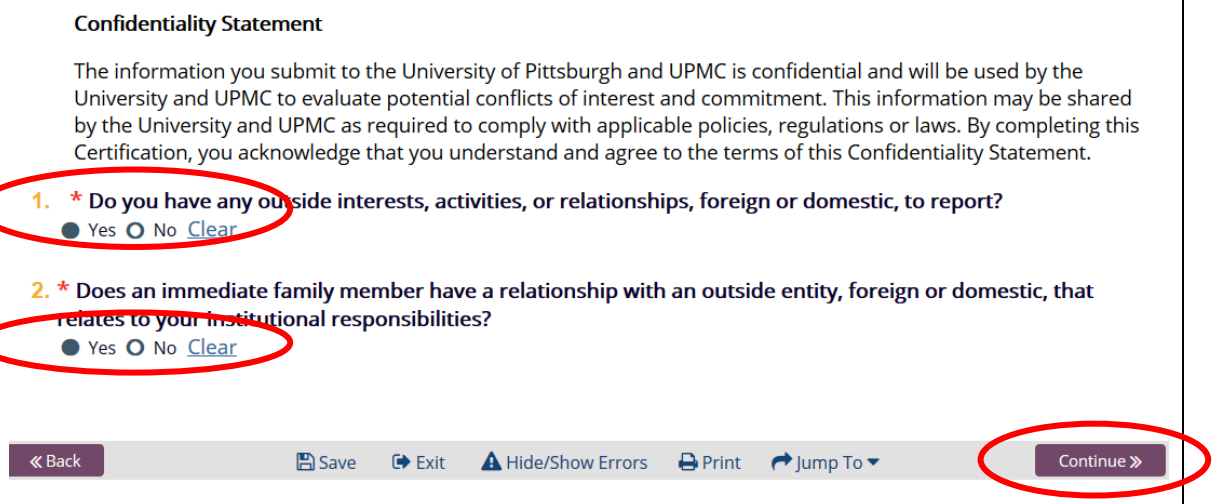
Completion of the Conflict of Interest Certification is mandatory. Failure to complete this form by April 15th may result in disciplinary action.

Completing this Certification satisfies the disclosure requirements of the University of Pittsburgh and UPMC policies governing conflicts of interest and conflicts of commitment.

Definitions

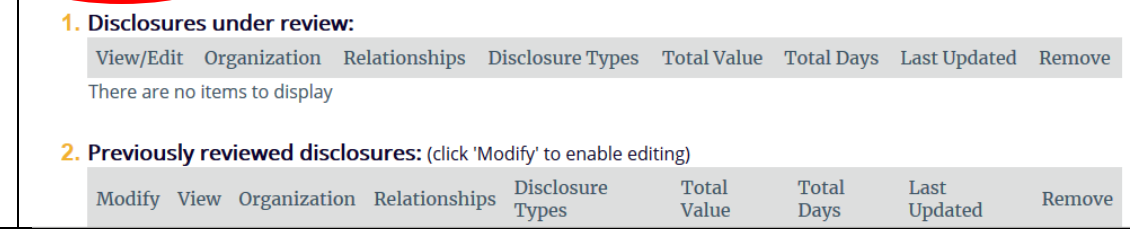
- A ***"conflict of interest"*** or ***"potential conflict of interest"*** exists when a non-University or non-UPMC financial interest, relationship or activity could actually influence, bias or compromise, or appear to influence, bias or compromise, (i) how you perform your institutional responsibilities, (ii) the nature, direction or results of your research, or (iii) result in personal gain for you or a member of your immediate family at the expense of the University or UPMC.
- A ***"conflict of commitment"*** exists when your outside interests, relationships or activities have a reasonable potential to compete or interfere with (i) the University or UPMC's educational, research or service mission, or (ii) your ability or willingness to perform the full range of your institutional responsibilities at the University or UPMC.
- ***"Immediate family"*** includes your spouse, registered domestic partner, dependents, and any other members of your household.
- ***"Institutional responsibilities"*** include your professional responsibilities at the University or UPMC, including but not limited to research, teaching, leadership, professional practice, membership on institutional committees or panels (e.g.: Institutional

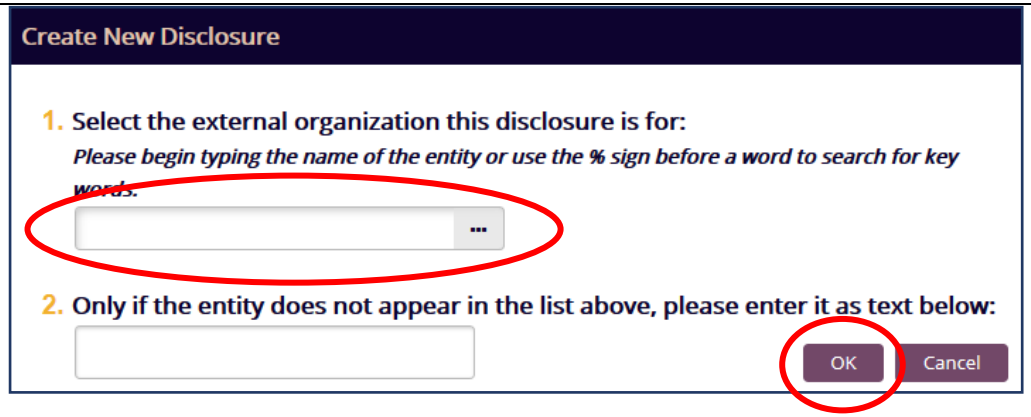
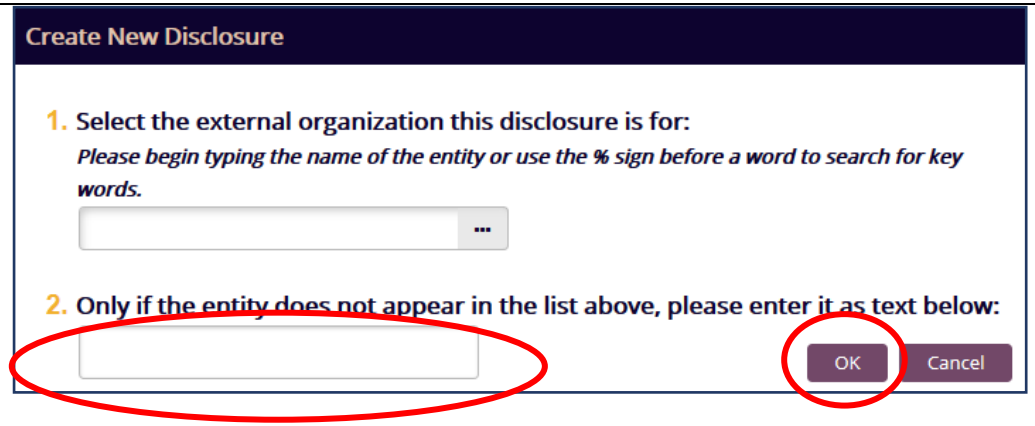
- Answer both questions at the bottom of the page to indicate whether you have anything to report. Click Continue » to proceed.
- If you have no interests to report, you will be taken directly to the **Additional Questions** section of the form.
- If you indicate that you have an outside interest, activity or relationship to report, you will be taken to the **Disclosure Details** page.



Adding a New Outside Interest, Relationship or Activity to your Form

- The first time you complete this form you must add all outside interests as new interests. They will be prepopulated for you in future disclosures.
- To add a new interest to your form, click Add Disclosure
- Add a disclosure for each outside entity with which you have a relationship.



➢ Input the **Name of the Outside Entity** into the search bar. ➢ Select the desired company from the drop down list and click OK.	
➢ ***Only if*** the name of the entity ***does not appear*** in the drop down list when you search, type the entity name into the box and create a ***New Entity*** in the system. ➢ If you enter a ***New Entity*** you will be prompted to add additional information about the entity further along in your form.	

General Information

- Answer all questions on the **General Information** page.
- When indicating the **type of relationship** you have with the outside entity at question 7, check ***all types of interests*** that you have with the entity.
- If you are unsure what type of relationship(s) you have, visit the COI Website for more information.

Disclosure for Melvina Simms (PI106) : General Information

1. Outside Entity:

or

If you cannot find the entity in the above list, enter its name as text here:

ABC Entity

2. * Who holds the interest? (*check all that apply*):
   - ☐ Self
   - ☐ Family Member

3. * Do you have an existing Conflict Management Plan (CMP) for this entity?
   - ○ Yes, I have a conflict management plan from the COI Office
   - ○ No, I do not have a conflict management plan

   Clear

4. * Do you conduct research at the University or UPMC that (1) evaluates or develops IP related to this entity's comm
   (2) is supported by this entity?
   - ○ Yes ○ No Clear

5. * Do you purchase products or services from this entity on behalf of the University or UPMC?
   - ○ Yes ○ No Clear

6. * Foreign Relationships and Support
   Is the entity a foreign government entity or affiliated with a foreign government entity or any foreign institutes of h
   - ○ Yes ○ No Clear

7. * What is the type of relationship with the outside entity? (*Check all that apply*)
   - ☑ Equity or Ownership Interest
   - ☑ Consulting and Other Professional Services (including but not limited to advisory, speaking, employee, independent contractor, editorial and expert witness services)
   - ☐ Management, Officer or Board of Directors Positions
   - ☐ Intellectual Property Rights and Technology Transfer Activities (e.g., royalties and milestone payments)
   - ☑ Reimbursed and/or Sponsored Travel
   - ☐ Other Support or Benefits (gifts, entertainment, loans, favors)

Questions about Relationship Types

- You will be asked questions about each type of relationship you have with the entity.
- The specific questions you see depend on what **types of relationships** you have and how you responded to questions on the **Institutional Relationships** page.

Disclosure for Melvina Simms (PI106) in ABC Entity: Equity or Ownership Interests

Equity interests include stock, stock options and other ownership interests whether currently vested or to be vested. Do not include income from or investments in investment vehicles in which the owner does not directly control the investment decisions, such as mutual funds or retirement accounts.

1. * Approximate value of interest, if known:

2. * Is this ownership interest greater than 5%?
   O Yes O No Clear

3. * Was this equity received in exchange for providing services to the entity?
   If "yes", you must also disclose the services you performed under "Consulting and Other Professional Services" or "Management, Officer or Board of Director Position" section of this form, as applicable. If you have not already done so, please return to the "General Information" view and select the appropriate relationship(s).
   O Yes O No Clear

4. Optional: Additional information you would like your supervisor or COI Office staff to know about this equity or ownership interest:

- If you indicate that you have **consulting or other professional services** or **management, officer or board of directors positions** you will be asked to report the **approximate time (days per year) you spent on the activity**.

Disclosure for Melvina Simms (PI106) in ABC Entity: Consulting and Other Professional Services

Disclose all consulting, advisory, speaking, editorial, book royalties, expert witness and other professional services activities, whether they are paid or unpaid.

1. * Was cash compensation received for this activity?
   ● Yes O No Clear

   a. * If "yes": amount of annual compensation:
   Disclose the maximum amount received or the amount reasonably anticipated to be received during the past or next 12 months.
   5,000

2. * Approximate time you spent on this activity (number of days per year):
   Record as numerals. Record partial days as decimals. For example, half a day should be recorded as 0.5, one and a half days should be recorded as 1.5, etc.
   15

3. Describe the professional services you performed for the entity. If reporting book authorship, indicate whether the book is required for courses you teach.
   If both Self and Family hold the interest please indicate the breakdown of compensation for each individual here.

Disclosure Summary

- After entering details about each **type of relationship** you have, you will be shown a **Disclosure Summary** that summarizes all relationships you disclosed with the entity.

- If you need to correct any information, click « Back at the top or bottom left of the page. If your information is correct, click Finish at the top or bottom right of the page to finalize your entry.

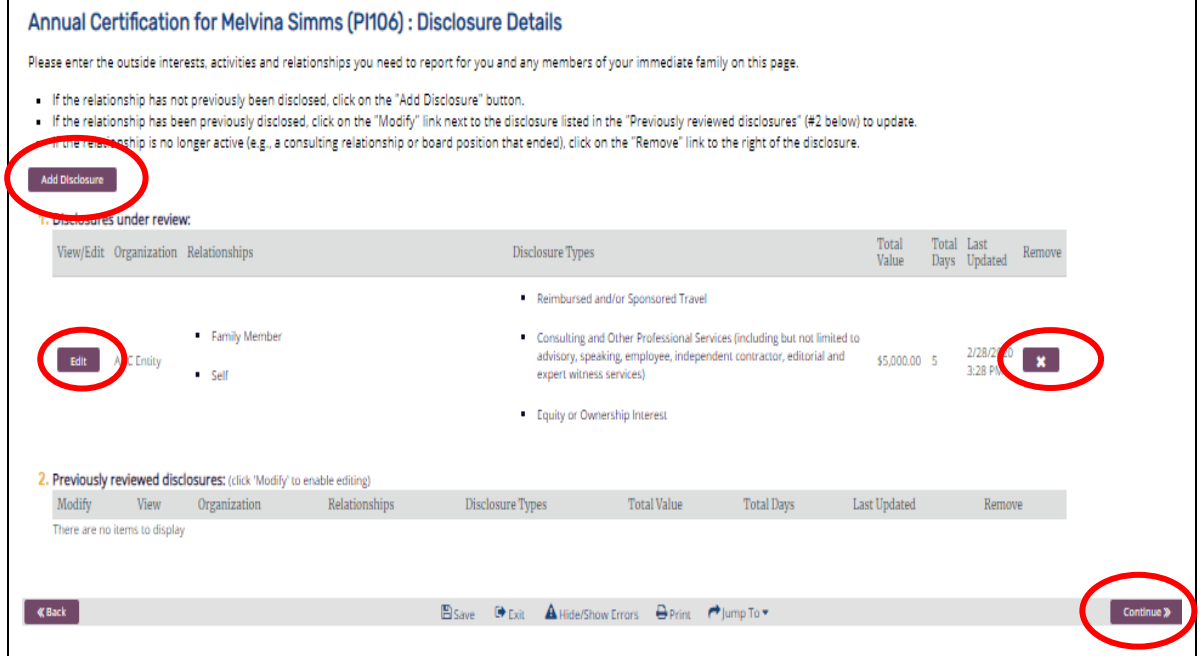
Disclosure for Melvina Simms (PI106) in ABC Entity: Disclosure Summary

Compensation Type	Amount Disclosed (self and family total)	Time Spent (self; days per year)
Equity or Ownership Interest	$2,000.00	
Consulting and Other Professional Services	$5,000.00	15
Management, Officer or Board of Directors Positions		
Intellectual Property Rights and Technology Transfer Activities		
Reimbursed and Sponsored Travel	$3,000.00	
Other Support or Benefits		
Total Amount Disclosed	$10,000.00	15

« Back Save Exit Hide/Show Errors Print Jump To Finish

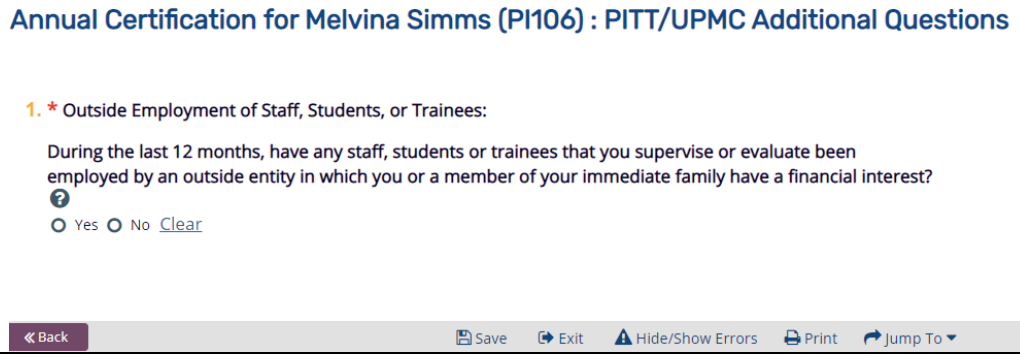
Finalizing Disclosure Details

- After you finalize an entry, you will be routed back to the **Disclosure Details** page where you can see all disclosures you have entered and add additional entities as needed.
- To add another entity click Add Disclosure at the top of the page.
- To change the details of an entry, click the Edit button to the left of the entry you want to change.
- To remove an entry, click the ✖ option to the right of the entry you want to change. *Note that the removed entity will continue to appear on your form. It will be displayed as "**Pending Removal**" until your supervisor reviews and approves of your form.*
- When you have added all entities and all interests you need to report, click Continue » at the top or bottom right of the page.



Additional Questions

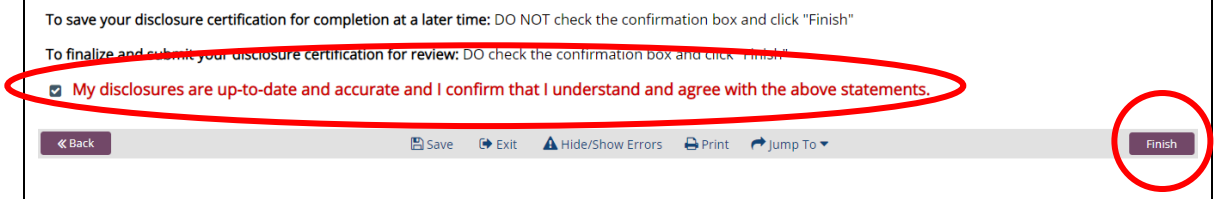
After entering all entities and relationships *or* after indicating on the **What to Disclose** page that you have nothing to report, you will be prompted to answer additional questions based on your **Institutional Relationships. You must answer all questions that appear on your form.**



Submitting Your Form

- Review the **Assurance and Certification** statement and summary of the disclosures you entered.
- When you are satisfied that you have accurately reported all required information, you are ready to submit your form.

- Click the verification statement at the bottom of the page to verify the accuracy of your form.
- If you need to make changes, click the **Back** button on the top or bottom right of the page to return and revise your form.
- To save and complete your disclosure at a later time, ***do not*** click **Finish**. Instead, click **Save** and **Exit** at the top or bottom of page.
- To **submit your form** click Finish on the top or bottom right of the page. Clicking **Finish** will submit your form and automatically send it to your supervisor(s) for review.



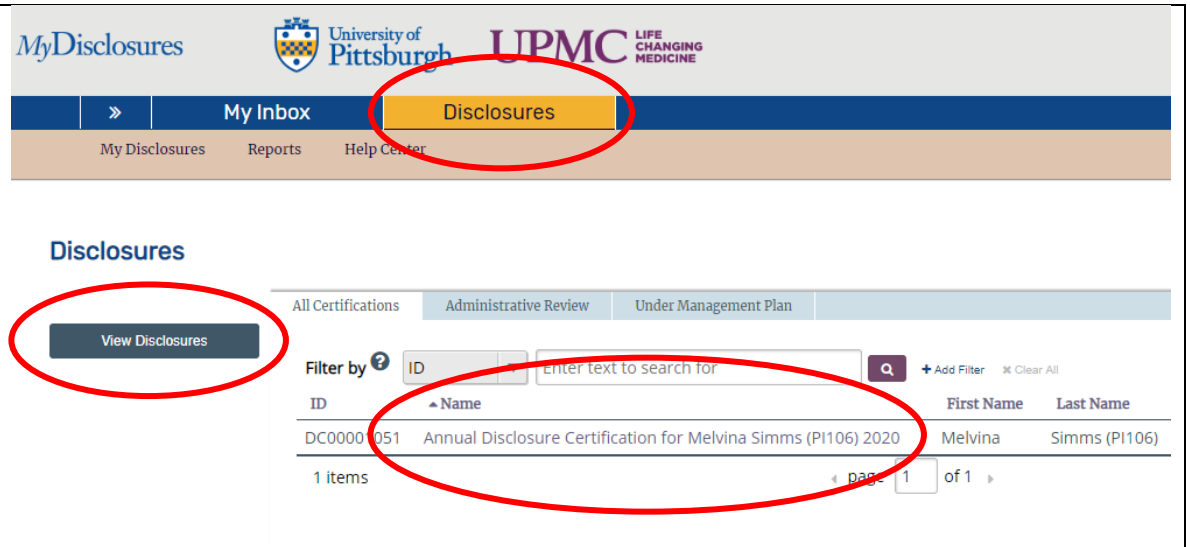
After you Submit your Form

- After sending your form to your supervisor for review, it will disappear from your inbox. Click the **Disclosures tab** at the top of the page to view your form.

Viewing your Form

- To review your form page-by-page, click View Disclosures on the left side of the page.

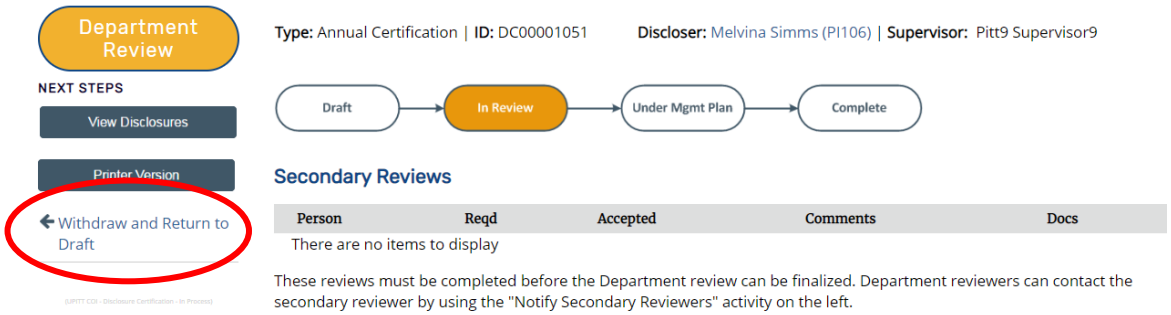
- To review a summary and details of your disclosure or to make changes to a form before supervisor review, click on the **Name** of the disclosure.



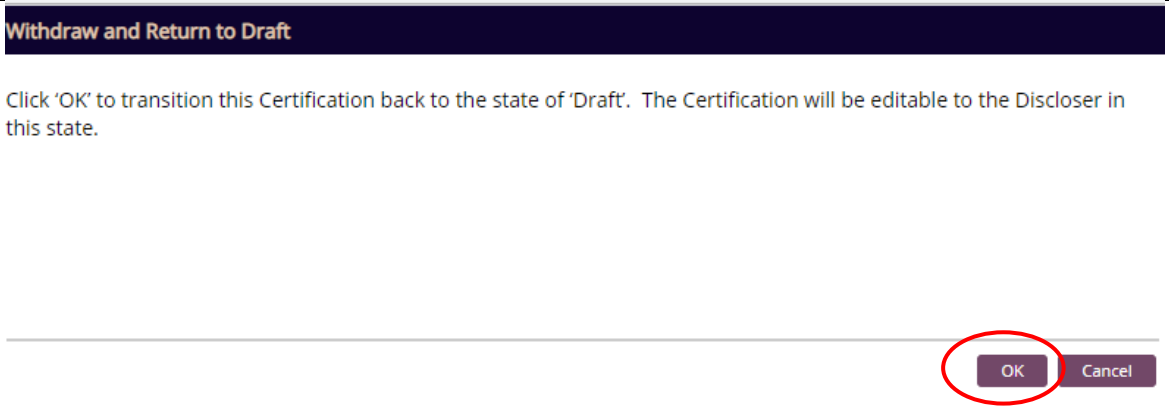
Making Changes Before Supervisor Review

- If you need to revise your form before your supervisor reviews, click the **Name** of your disclosure as shown above.

- Click **Withdraw and Return to Draft** on the left side of the page.

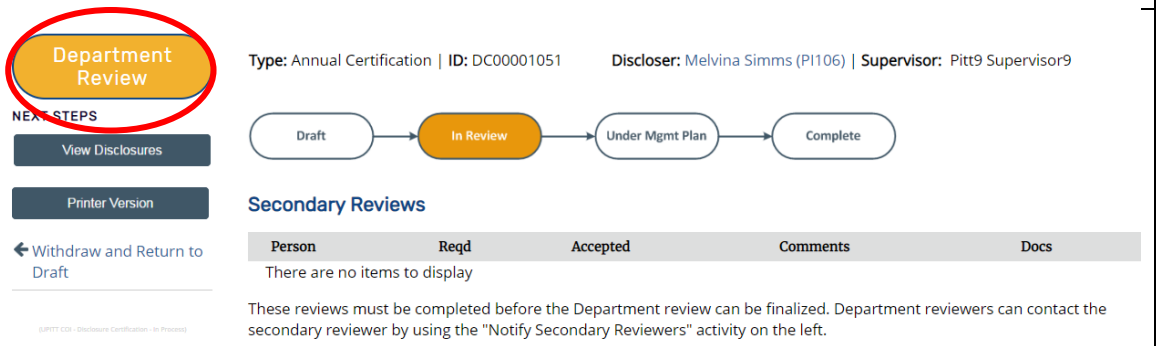


- To retract your form from your supervisor's review queue and edit your form, click OK.
- Once you click **OK** and withdraw your form, your form will return to **Draft** state. Edit your information as needed and re-submit your form.



Supervisor (Department) Review

- After you submit your form, it will automatically be sent to your supervisor(s) for review. *My*Disclosures displays this stage of review, from the time you submit your review through the time your supervisor(s) submit their response, as **Department Review.**
- If you disclose any interests on your form, your supervisor will review each item to ensure there are **no conflicts with your institutional responsibilities**.

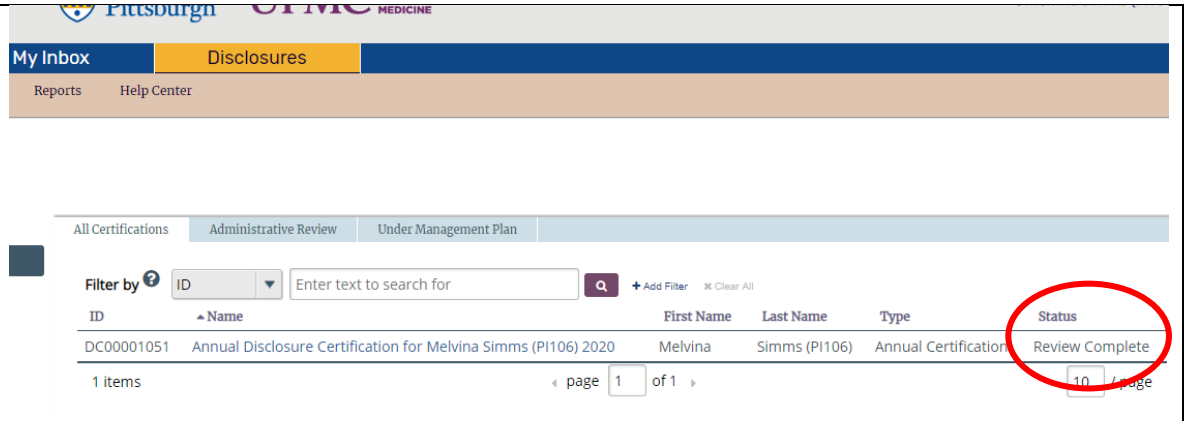


After Supervisor Review

- You will receive an email notification informing you of your supervisor(s)' disposition of your form. Your supervisor's disposition will be:
  - Approve
  - Approve with Comment
  - Disapprove

- The email will provide you with instructions on how to view and respond to any comments from your supervisor(s).

- When your supervisor(s) have approved your form, its status will change to **Review Complete.** Your annual disclosure obligation is satisfied once your form is in this state.



How do I see a copy of my annual disclosure form?

- You can see your disclosures at any time by logging in to *mydisclosures.pitt.edu* and clicking the **Disclosures** tab at the top of the page.

- Click on the **Name** of the form you want to view. You will be taken to a new screen where a summary of your disclosures will be displayed.