

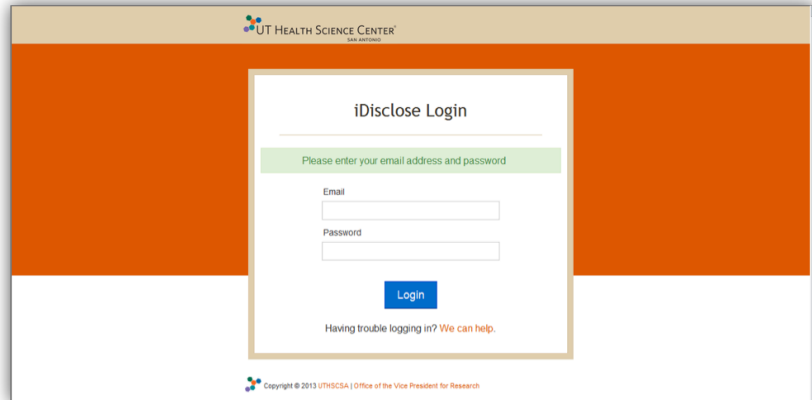
# iDisclose v3.0 Step By Step (Single Page)

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## Accessing My iDisclose Reports

### Sign On

1. Go to <https://vpr.uthscsa.edu/iDisclose>
2. To submit your 2015 Annual Report **after reporting season** has closed, click on **iDisclose Dashboard** button on the top-right of the iDisclose webpage.
3. Log on using your UTHSCSA **email address** and **password**



## Disclosing as a Current Employee

### Step 1 - Start Here

1. From the Dashboard, locate the section **Annual Reports**.
2. **To begin your annual report** click the **Add New** button.
3. Follow instructions if they are presented to you.
  - a. If you completed a CY 2014 report, you will be given an option to clone last year's report, if you submitted disclosures. Cloning last year's report will populate your disclosure information and direct you to Step 3-Disclosures. If you do not want to clone, click Cancel and continue from the Overview page.
4. If you had no disclosures in CY 2014, you will be asked, **'If 2015 was the same, check this box...'**

#### Welcome Back!

We see that you submitted an iDisclose report before.

No external activities were reported previously.

If 2015 was **the same**, check this box

otherwise click "Cancel" and tell us what changed for you.

Cancel

5. If Cancel was selected, you will be directed to the Overview page. Answer the (4) Yes / No questions that are presented.
  - a. Your relationship with for-profit entities
  - b. Your relationship with non-profit entities
  - c. Gift reporting as required by the State of Texas
6. Your conduct of research as part of employment

activate an Entity

- Menus & Icons
- Step 3 - Disclosures
  - Add a Disclosure
  - Edit a Disclosure
  - Delete a Disclosure

- Submit your Disclosures
- Step 4 - Certify
- Was a disclosure identified as requiring prior approval?

- The iDisclose Dashboard
  - Icons
  - Contact Information

**Your relationship with for-profit entities**

1. Do you have for-profit relationships to declare? Answer **Yes** if you or a family member:

- Were compensated by, played a role in, held intellectual property rights in, or received royalties from a for-profit business;
- Had travel expenses paid by a for-profit business outside the Health Science Center;
- Owned stock or held stock options in a for-profit business related to your HSC responsibilities;
- Supervised an employee involved in your for-profit business activities.

**Your relationships with non-profit organizations**

2. Do you have non-profit relationships to declare? Answer **Yes** if you or a family member:

- Engaged in outside professional activities as defined in HOP 10.1.8 (do not report professional meetings, CME etc.);
- Served as a member of a governing board of a non-profit organization;
- Received royalties from or held intellectual property rights in a non-profit organization;
- Had travel expenses paid by a non-profit business outside the Health Science Center.

**Gift reporting as required by the State of Texas**

3. Do you have gifts to declare? Answer **Yes** if you or a member of your family:

- Received anything exceeding \$250 in value from a non-family member in the past year.

**Research**

4. Do you conduct research as part of your employment? Answer **Yes** if you:

- Were the Principal Investigator of a research study, funded grant or contract;
- Received compensation for, or played any role in, the conduct of research.

7. Click **Continue to the Next Step** when finished.

8. If Q1-3 answers are No, this indicates you have nothing to declare. You will advance to Step 4- Certify.

## Step 2 - Entities

An entity is an individual, business, institution or organization that you interact with and with whom you have external activities to disclose. Before navigating to the disclosure page, you must have at least 1 Entity within your Entity List and it must be **active**. If you would like to use an Entity from last year, the Actions column contains options to edit, or to simply view your entity. If you need to add a new entity, click the Add New button, and begin to complete the Add Entity Details page.

Entity	Category	Type	Tag	Status
<input type="checkbox"/> American Heart Association	Non-Profit	--		
<input type="checkbox"/> Clinical Trials.Gov	For-Profit	Privately Traded Co		

**NOTE:** Any entities you add now will be available for your use in the future. If you entered disclosures for CY 2013, your entities for those disclosures will be available.

## Add an Entity

- Click



and complete all fields.

- Select an Entity Category: For-Profit, Non-Profit or Government
- Select an Entity Type: options are based on the Entity Category you selected
- Select an Entity Industry: options are based on the Entity Category you selected
- Complete Entity Name
- Complete the Location - Street Address and City State/Province, Country
- Click Save

### Add Entity Details



**Entity Category**

**Entity Type**

**Entity Industry**

**Entity Name Lookup**

**Entity Name**

**Street Address**

**City, State/Province, Country**

### Edit an Entity

- Select an entity currently listed by clicking the check box
- Click the Edit button
- The information about that entity will display in the fields in the bottom half of the window.
- Make your changes and select the blue **Save** button.

### Delete an Entity

- Select an entity currently listed by clicking the check box
- Click on the Trashcan icon in the Action column of the entity you want to delete.
- A warning message will be displayed asking you to confirm your action.

### Delete Entity Details



**Entity Name - 1**

**WARNING!!!**

If you delete this entity you will not be able to use it in future disclosures!

Click "Delete" below to continue or "Cancel" to exit.

- Click on the blue Delete button to delete the entity or select Cancel if you change your mind.
- Remember, if you simply want to stop an entity from displaying as an option when completing your Disclosure page, Inactivate the entity.

**NOTES:** About deleting entities:

1. Entities that are used in a report that has been certified and submitted cannot be deleted. If you choose to delete such an entity it will be made permanently unavailable to you.
2. Deleting an entity that has never been used in a report is permitted.
3. If you delete an entity used in a disclosure that is part of your current report, you must either delete the disclosure or add the appropriate entity to it.

### Activate/Inactivate an Entity




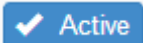
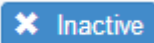

Remember that entities must be activated in order to use them in your disclosures. This feature is intended to provide you with a way of limiting the number of entities that are available for use in disclosures without needing to delete them.

- If the Entity Status shows the Active button, your entity is Active.
  - To make Inactive, click the Active button.
- If the Entity Status shows the Inactive button, your entity is Inactive.
  - To make Active, click the Inactive button.


**NOTES:**

If you intend to use your entity in order to document future disclosures, Inactive the entity. If you delete, you will not be able to retrieve what has been deleted.

### Menus & Icons

	Allows you to edit an Entity.
	Deletes an Entity.
	Allows you to view your Entity within a browser window.
	Allow your Entity to be displayed as an option within the Disclosures page.
	Prevents your Entity from being displayed within the Disclosures page as an option.
	If the tag icon is highlighted, this indicates that you have incomplete fields regarding your entity. Click the tag to complete any of the three fields: category, type, and industry.

### Step 3 - Disclosures

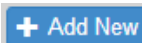
 If you clicked the **Clone Records** button, you will be directed to the Disclosures page. If you will be adding Disclosures for Entities not listed in your Entities page, click the Entity breadcrumb below the section heading, **Your Disclosures**.



A disclosure contains the details of your activities with an outside entity. The first time you open this window there will be no disclosures to display.

### Add a Disclosure

To proceed with creating a disclosure, complete all fields:

- Click  and complete all fields.
- Disclosure Type
  - Uncompensated Activity, Equity, Intellectual Property, Substantial Business

Interest or Gift.

- Activity Type
  - Advisory Board / Committee, Governing Board, Officer, Consultant, Expert Witness, Family Member Employment, Administrative Support, Reviewer, Seminar/Lecture, Speaker, Financial Services, Legal Services, Professional Services, Retail, Sales, Volunteer, or Other.
- Relates to Job Function
- Disclosure For
  - Myself, Spouse, Dependent child, Parent, Unmarried Adult (living with you), Other
- Start and End date **should be the date(s) the activity took place**
- Entity Name - select from the list. All active entities will be displayed.
- Description of Activity: **Suggested Text** - for some disclosure types, suggested text will be provided. The available text will help guide you in completing the description of activity.

- Total \$ Amount
- \$ to HSC
  - No; Yes
- HSC Work Days (in days)
- HSC Vacation
- Entity Supports Your Research
- Involves Intellectual Property

#### Add Disclosure Details

Close Save

- Click Save when done. You will be directed back to the Disclosures page.

#### Edit a Disclosure

- Click on the Pencil icon in the activity column of the entity you are wanting to edit.
- The information about that entity will appear in the fields in the bottom half of the window.
- Make your changes and select the blue **Save** button.

## Delete a Disclosure

- Click on the Trashcan icon in the Action column of the disclosure you want to delete.
- A warning message will be displayed asking you to confirm your action.

### Delete Disclosure ×

**Entity Name - 3**

Governing Board :: Outside Employment - \$ 25,500

**WARNING!!!**

You are about to permanently delete this disclosure!  
Deleted disclosures cannot be recovered.

Click "Delete" below to continue or "Cancel" to exit.

Cancel Delete

- Click on the blue Delete button to delete the entity or select Cancel if you change your mind.
- Remember, if you simply want to stop an entity from displaying as an option when completing your Disclosure page, Inactivate the entity.

NOTES: About editing and deleting a disclosure:

1. A disclosure can only be deleted if it is part of a report you are editing.
2. Similarly, a disclosure can only be edited before you submit your report.
3. Disclosures in reports that have been certified and submitted cannot be deleted (the trashcan button will be disabled).
4. Similarly, disclosures cannot be edited if the report has been submitted. The Pencil button will cause the details to be displayed in the bottom half of the window but all fields will be disabled.

## Submit your Disclosures

Once you have entered at least one disclosure you will be able to submit.

1. Select the disclosures you will be submitting by checking the first column. As you select Disclosures to be submitted, a numerical value will display on the Submit button indicating the number of disclosures you will be submitting.
2. Click the Submit button if you have no other disclosures to add.

Your Disclosures ×

Overview / Entity / **Disclosure** / Certify

Current Disclosures +

Select New or Cloned disclosures by checking a box in the appropriate row below - then click [ Submit ]

Disclosures of Activities & Financial Interests ×

+ Add New  Edit  View  Delete  Email  Download  Submit  Help

<input type="checkbox"/>	Entity	Relationship	Total \$	Work Days	Vacation	Status	
<input checked="" type="checkbox"/>	iCount Tests		\$ 2	0	No	New	2016-01-04
<input type="checkbox"/>	iCount Tests	Governing Board	\$ 3	1	No	New	2016-01-04

## Clone a Disclosure

If you have disclosures that were approved prior to calendar 2015, you will have the ability to clone and add to your 2015 Annual Report. From Disclosures of Activities & Financial

Interests or Prior Approvals. Below your rows of Disclosures a link will display,

[Show approved disclosures](#)

. Click the

[Show approved disclosures](#)

link to view all previously approved disclosures (both Prior Approvals and Non-Prior Approvals) that were not cloned. To close the view, click

[Hide approved disclosures](#)

Entity	Relationship	Status	
Testing Board Service	Consultant	Submitted	2016-01-05

[Clone Prior Approvals to include them in this submission](#)

Entity	Relationship	Status	
NIH	Equity Holdings	Disapproved	2015-11-25
iCount Tests	Governing Board	Approved	2015-11-25
NIH	Professional Services	Approved	2015-10-28

**To clone:**

1. Click the check box to the entity row you want to clone.
2. Click the blue clone button.
3. You will then see the new row for the disclosure you cloned.
4. Click one of the duplicate disclosures.
5. Click the blue Edit button in order to customize to the additional relationship with that particular entity.

## Step 4 - Certify

The final step is Certification. You must check each box in order to submit your report; each certification is mandated by the policies described on this page.

1. Check each certification box. *Note: Statement 2 will only be available if you confirmed that you do conduct research as part of your employment within the Overview page, Q4.*

**To finish your report, certify your responses and click "Submit"**

By checking this box I certify that: (1) I have read and understand the Health Science Center's policies on Conflicts of Scholarly, Research and Clinical Activity (H.O.P. 10.1.6), Conflict of Commitment (H.O.P. 10.1.8) and Outside Activities and Relationships (H.O.P. 10.1.9). (2) I have completed this Report to the best of my knowledge and belief. (3) If required, I will comply with any conditions or restrictions imposed by the Health Science Center to manage any real or perceived conflicts of interest or commitment. (4) Should my outside financial or managerial interests, or those of my family, change in a way that results in different answers to any of the questions in this Report, I agree to submit a revised version within 60 days of the change.

I understand that I am required to participate in Conflict of Interest and Conflict of Commitment training. This training is available through the Health Science Center Knowledge Center and renews every 4 years.

All faculty and all exempt staff of The University of Texas System and The University of Texas institutions must annually acknowledge that they have read and understand the UT System policies related to conflict of interest and conflict of commitment (UTS 180). I hereby affirm I have read and understand these policies.

2. The **Submit** button will activate, and a confirmation message will display.

Preparing your email - your submission is complete!

3. Once you submit your report, your session in the iDisclose system will automatically end.
4. If you entered disclosures, you will receive two emails. One indicating your report was received and submitted successfully, and the second email with a PDF attachment of your report. If you did not enter disclosures, you will receive one email indicating your report was received and submitted successfully.

## Was a disclosure identified as requiring prior approval?

### Clone a Disclosure

If you have disclosures that were approved prior to calendar 2015, you will have the ability to clone and add to your 2015 Annual Report. From Disclosures of Activities & Financial Interests or Prior Approvals. Below your rows of Disclosures a link will display,

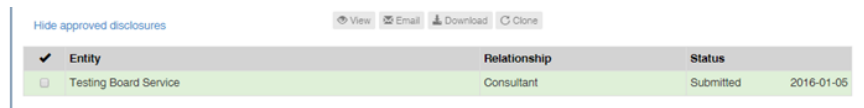
[Show approved disclosures](#)

. Click the

[Show approved disclosures](#)

link to view all previously approved disclosures (both Prior Approvals and Non-Prior Approvals) that were not cloned. To close the view, click

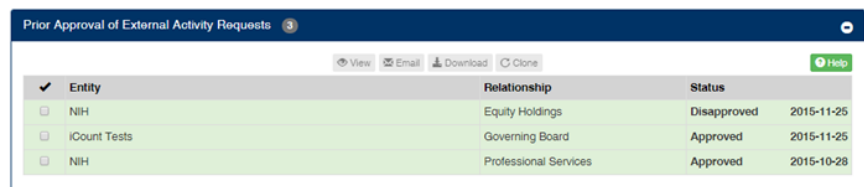
[Hide approved disclosures](#)



Hide approved disclosures View Email Download Clone

<input checked="" type="checkbox"/>	Entity	Relationship	Status	
<input type="checkbox"/>	Testing Board Service	Consultant	Submitted	2016-01-05

Clone Prior Approvals to include them in this submission



Prior Approval of External Activity Requests View Email Download Clone Help

<input checked="" type="checkbox"/>	Entity	Relationship	Status	
<input type="checkbox"/>	NIH	Equity Holdings	Disapproved	2015-11-25
<input type="checkbox"/>	ICount Tests	Governing Board	Approved	2015-11-25
<input type="checkbox"/>	NIH	Professional Services	Approved	2015-10-28

#### To clone:

1. Click the check box to the entity row you want to clone.
2. Click the blue clone button.
3. You will then see the new row for the disclosure you cloned.
4. Click one of the duplicate disclosures.
5. Click the blue Edit button in order to customize to the additional relationship with that particular entity.



Prior Approvals View Email Download Clone Help

<input checked="" type="checkbox"/>	FY	Entity	Relationship	Status	
<input type="checkbox"/>	2015	American Heart Association	Administrative Support	Submitted	2015-02-23
<input type="checkbox"/>	2015	American Heart Association	Advisory Board/Committee	Editing	
<input type="checkbox"/>	2014				1 found
<input type="checkbox"/>	2013				1 found

## Disclosing as a New Employee

### Step 1 - Start Here

1. From the Dashboard, locate the section **Annual Reports**.
2. **To begin your annual report** click the **Add New** button.
3. Follow instructions if they are presented to you.
4. **Overview page**, answer the (4) Yes / No questions.
  - a. Your relationship with for-profit entities
  - b. Your relationship with non-profit entities
  - c. Gift reporting as required by the State of Texas
  - d. Do You conduct of research as part of employment



**Your relationship with for-profit entities**

1. Do you have for-profit relationships to declare? Answer **Yes** if you or a family member:

- Were compensated by, played a role in, held intellectual property rights in, or received royalties from a for-profit business;
- Had travel expenses paid by a for-profit business outside the Health Science Center;
- Owned stock or held stock options in a for-profit business related to your HSC responsibilities;
- Supervised an employee involved in your for-profit business activities

Yes No

**Your relationships with non-profit organizations**

2. Do you have non-profit relationships to declare? Answer **Yes** if you or a family member:

- Engaged in outside professional activities as defined in HOP 10.1.8 (do not report professional meetings, CME etc);
- Served as a member of a governing board of a non-profit organization;
- Received royalties from or held intellectual property rights in a non-profit organization;
- Had travel expenses paid by a non-profit business outside the Health Science Center.

Yes No

**Gift reporting as required by the State of Texas**

3. Do you have gifts to declare? Answer **Yes** if you or a member of your family:

- Received anything exceeding \$250 in value from a non-family member in the past year.

Yes No

**Research**

4. Do you conduct research as part of your employment? Answer **Yes** if you:

- Were the Principal Investigator of a research study, funded grant or contract;
- Received compensation for, or played any role in, the conduct of research.

Yes No

- Click **Continue to the Next Step** when finished.
- If Q1-3 answers are No, this indicates you have nothing to declare. You will advance to **Step 4- Certify**.

## Step 2 - Entities

An entity is an individual, business, institution or organization that you interact with and with whom you have external activities to disclose. Before navigating to the disclosure page, you must have at least 1 Entity within your Entity List and it must be **active**.

**Your Entities**

Overview / **Entity** / Disclosure / Certify

Add new or activate existing entities to continue

**Remember: Only activated entities are available for selections in Disclosures.**

**Entities** 0

You must have at least **1 active entity** to submit a disclosure.

+ Add New Edit View Delete Help

Entity	Category	Type	Tag	Status
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Continue to the Next Step

**NOTE:** As a New Employee you will have no entities displayed. Any entities you add now will be available for your use in the future.

### Add an Entity

- Click



and complete all fields.

- Select an Entity Category: For-Profit, Non-Profit or Government
- Select an Entity Type: options are based on the Entity Category you selected
- Select an Entity Industry: options are based on the Entity Category you selected
- Complete Entity Name
- Complete the Location - Street Address and City State/Province, Country
- Click Save

### Add Entity Details

×

**Entity Category**  
Select a category

**Entity Type**  
Select a type

**Entity Industry**  
Select an industry

**Entity Name Lookup**  
Find this Entity in IRS or NASDAQ records

**Entity Name**  
Name

**Street Address**  
Address line 1

**City, State/Province, Country**  
Address line 2

Close Save

### Edit an Entity

- Select an entity currently listed by clicking the check box
- Click the Edit button
- The information about that entity will display in the fields in the bottom half of the window.
- Make your changes and select the blue **Save** button.

### Delete an Entity

- Select an entity currently listed by clicking the check box
- Click on the Trashcan icon in the Action column of the entity you want to delete.
- A warning message will be displayed asking you to confirm your action.

### Delete Entity Details

×

Entity Name - 1

**WARNING!!!**

If you delete this entity you will not be able to use it in future disclosures!

Click "Delete" below to continue or "Cancel" to exit.

Cancel Delete

- Click on the blue Delete button to delete the entity or select Cancel if you change your mind.
- Remember, if you simply want to stop an entity from displaying as an option when completing your Disclosure page, Inactivate the entity.

**NOTES:** About deleting entities:

1. Entities that are used in a report that has been certified and submitted cannot be deleted. If you choose to delete such an entity it will be made permanently unavailable to you.
2. Deleting an entity that has never been used in a report is permitted.
3. If you delete an entity used in a disclosure that is part of your current report, you must either delete the disclosure or add the appropriate entity to it.

### Activate/Inactivate an Entity

Remember that entities must be activated in order to use them in your disclosures. This feature is intended to provide you with a way of limiting the number of entities that are available for use in





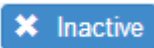

disclosures without needing to delete them.

- If the Entity Status shows the Active button, your entity is Active.
  - To make Inactive, click the Active button.
- If the Entity Status shows the Inactive button, your entity is Inactive.
  - To make Active, click the Inactive button.

**NOTES:**

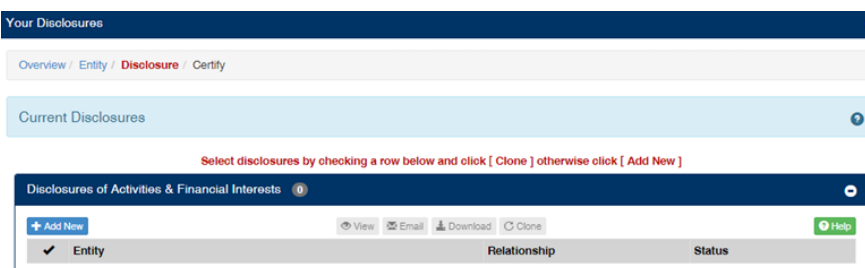
If you intend to use your entity in order to document future disclosures, Inactive the entity. If you delete, you will not be able to retrieve what has been deleted.

### Menus & Icons

	Allows you to edit an Entity.
	Deletes an Entity.
	Allows you to view your Entity within a browser window.
	Allow your Entity to be displayed as an option within the Disclosures page.
	Prevents your Entity from being displayed within the Disclosures page as an option.
	If the tag icon is highlighted, this indicates that you have incomplete fields regarding your entity. Click the tag to complete any of the three fields: category, type, and industry.

### Step 3 - Disclosures

A disclosure contains the details of your activities with an outside entity. The first time you open this window there will be no disclosures to display.



#### Add a Disclosure

To proceed with creating a disclosure, complete all fields:

- Click  and complete all fields.
- Disclosure Type
  - Uncompensated Activity, Equity, Intellectual Property, Substantial Business Interest or Gift.
- Activity Type
  - Advisory Board / Committee, Governing Board, Officer, Consultant, Expert Witness, Family Member Employment, Administrative Support, Reviewer, Seminar/Lecture, Speaker, Financial Services, Legal Services, Professional Services, Retail, Sales, Volunteer, or Other.
- Relates to Job Function
- Disclosure For

- Myself, Spouse, Dependent child, Parent, Unmarried Adult (living with you), Other
- Start and End date **should be the date(s) the activity took place**
- Entity Name - select from the list. All active entities will be displayed.
- Description of Activity: **Suggested Text** - for some disclosure types, suggested text will be provided. The available text will help guide you in completing the description of activity

Description of Activity
Suggested Text

Source
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**Outside Employment:** Please describe the work to be performed for this outside job. Include the approximate hours you will spend in this employment and the number of days of absence from the university. [Copy & paste suggestion]: The work related to this job is: ... I anticipate working ... days/year on this job.

- Total Amount
- \$ to HSC
  - No; Yes
- HSC Work Days (in days)
- HSC Vacation
- Entity Supports Your Research
- Involves Intellectual Property

#### Add Disclosure Details ✕

**Disclosure Type**

**Activity Type**

**Disclosure For**

**Start Date**

**End Date**

**Entity Name**

**Description of Activity** Suggested Text

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**Total \$ Amount**

**\$ to HSC**

**HSC Work Days**

**HSC Vacation**

**Entity Supports Your Research**

**Involves Your Intellectual Property**

**All active fields are required. Disabled fields display with a gray background.**

Close
Save

- Click Save when done. You will be directed back to the Disclosures page.

#### Edit a Disclosure

- Click on the Pencil icon in the activity column of the entity you are wanting to edit.
- The information about that entity will display in the fields in the bottom half of the window.
- Make your changes and select the blue **Save** button.

#### Delete a Disclosure

- Click on the Trashcan icon in the Action column of the disclosure you want to delete.
- A warning message will be displayed asking you to confirm your action.

## Delete Disclosure



### Entity Name - 3

Governing Board :: Outside Employment - \$ 25,500

#### WARNING!!!

You are about to permanently delete this disclosure!  
Deleted disclosures cannot be recovered.

Click "Delete" below to continue or "Cancel" to exit.

Cancel

Delete

- Click on the blue Delete button to delete the entity or select Cancel if you change your mind.
- Remember, if you simply want to stop an entity from displaying as an option when completing your Disclosure page, Inactivate the entity.

NOTES: About editing and deleting a disclosure:

1. A disclosure can only be deleted if it is part of a report you are editing.
2. Similarly, a disclosure can only be edited before you submit your report.
3. Disclosures in reports that have been certified and submitted cannot be deleted (the trashcan button will be disabled).
4. Similarly, disclosures cannot be edited if the report has been submitted. The Pencil button will cause the details to be displayed in the bottom half of the window but all fields will be disabled.

## Submit your Disclosures

Once you have entered at least one disclosure you will be able to submit.

1. Select the disclosures you will be submitting by checking the first column. As you select Disclosures to be submitted, a numerical value will display on the Submit button indicating the number of disclosures you will be submitting.
2. Click the Submit button.

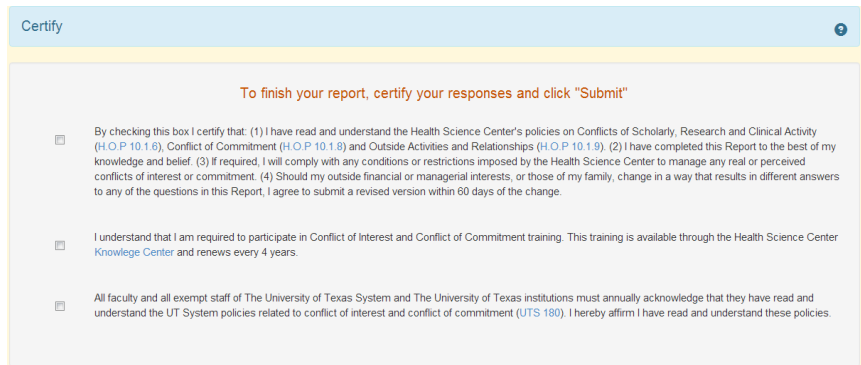
The screenshot shows a web interface titled "Your Disclosures" with a breadcrumb trail: Overview / Entity / Disclosure / Certify. Below the breadcrumb is a "Current Disclosures" section with a plus icon. A red instruction reads: "Select New or Cloned disclosures by checking a box in the appropriate row below - then click [ Submit ]". The main section is titled "Disclosures of Activities & Financial Interests" with a question mark icon. It features a toolbar with buttons for Add New, Edit, View, Delete, Email, Download, and Submit (with a '1' indicator). Below the toolbar is a table with columns: Entity, Relationship, Total \$, Work Days, Vacation, and Status. The table contains three rows:

Entity	Relationship	Total \$	Work Days	Vacation	Status
<input checked="" type="checkbox"/> iCount Tests		\$ 2	0	No	New 2016-01-04
<input type="checkbox"/> iCount Tests	Governing Board	\$ 3	1	No	New 2016-01-04

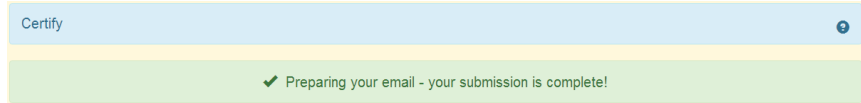
## Step 4 - Certify

The final step is Certification. You must check each box in order to submit your report; each certification is mandated by the policies described on this page.

1. Check each certification box. *Note: Statement 2 will only be available if you confirmed that you do conduct research as part of your employment within the Overview page, Q4.*




2. The **Submit** button will activate, and a confirmation message will display.



3. Once you submit your report, your session in the iDisclose system will automatically end.
4. If you entered disclosures, you will receive two emails. One indicating your report was received and submitted successfully, and the second email with a PDF attachment of your report. If you did not enter disclosures, you will receive one email indicating your report was received and submitted successfully.

## Was a disclosure identified as requiring prior approval?

If your report contained disclosures identified as needing prior approval, you will see the disclosure in the Prior Approvals section of your dashboard.



FY	Entity	Relationship	Status	found
2015	American Heart Association	Administrative Support	Submitted	2 found
2015	American Heart Association	Advisory Board/Committee	Editing	
2014				1 found
2013				1 found

## The iDisclose Dashboard

Completing your disclosures of outside activities takes place through the iDisclose Dashboard. Contents in the Dashboard are *Entities*, *Prior Approvals*, *Disclosure of Activities & Financial Interests and Annual Reports*.

### Sections Overview:

- **Entities** will display entities you have previously added to iDisclose. Reporting in 2015 provides additional fields in the entities section. Edit the entity and make active in order to use it in your 2015 reporting or in the future.
- **Disclosures of Activities & Financial Interests** will display disclosures for the different reporting periods. If you entered a disclosure in 2014 and will need to use it in 2015, you have the ability to clone.
- **Prior Approvals** will display all disclosures which are designated by the COI office as Prior Approvals. If any disclosure from 2013 or 2014 was identified as a prior approval, you will be able to view in in the 2013 or 2014 area. During annual reporting, if in your report a disclosure is identified as a 'prior approval' you will see the single disclosure(s) in the Prior Approvals section.
- **Annual Reports** will contain all past reports. Here you will have the option to view, print and email. Any reports prior to CY 2012 will not be available for viewing.

**Entities** 3

+ Add New Edit View Delete Help

Entity	Category	Type	Tag	Status
<input type="checkbox"/> Mission Pharmacal	Non-Profit	--		<input type="checkbox"/> Inactive
<input type="checkbox"/> My Entity Name Goes Here	For-Profit	Privately Traded Co		<input checked="" type="checkbox"/> Active
<input type="checkbox"/> United Way	Non-Profit	--		<input checked="" type="checkbox"/> Active

**Disclosures of Activities & Financial Interests** 3

+ Add New Edit View Delete Email Download Clone Submit Help

FY	Entity	Relationship	Status	
<input type="checkbox"/> 2015	NIH	Professional Services	Created	2015-02-25
<input type="checkbox"/> 2015	National Science Foundation	Governing Board	Created	2015-02-23
		2014		2 found
		2013		4 found

**Prior Approvals** 2

View Email Download Clone Help

FY	Entity	Relationship	Status	
		2014		1 found
		2013		1 found

**Annual Reports** 4

Edit View Delete Email Download Help




Description	Disclosures	\$ Total	Report Status
<input checked="" type="checkbox"/>			




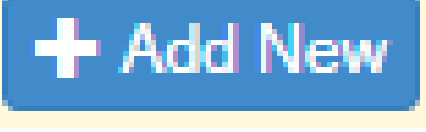
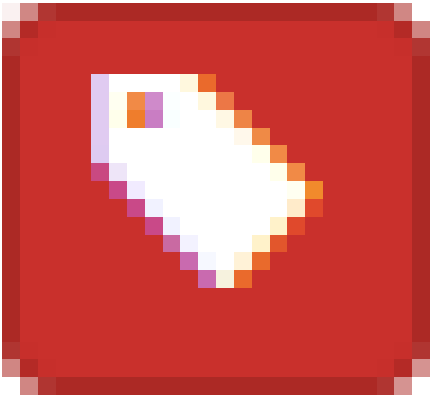



**Annual Reports** 3

+ Start Your 2014 Report Edit View Delete Email Download Help

Description	Disclosures	\$ Total	Report Status
<input type="checkbox"/> January - December 2013	0	\$ 0	Submitted 2014-02-25
<input type="checkbox"/> New Employee	3	\$ 0	Approved 2013-12-31
<input type="checkbox"/> January - December 2012	3	\$ 0	Approved 2012-12-31

### Icons

Icon	Description
	Allows you to edit a report.
	Deletes a report.
	Allows you to view your report within a browser window.

	<p>Allows you to email a PDF version of your report.</p>
	<p>When a itemlike a disclosure or entity is checked, the clone button will be available. This will allow you to clone, or duplicate the item.</p>
	<p>When you are ready to submit your disclosure for annual reporting or a single disclosure for prior approvals the submit button must be clicked.</p>
	<p>Allows you to add a new entity or new disclosure.</p>
	<p>Indicates there is missing information for a specific entity. The entity will not be listed as available within the Disclosure page.</p>
	<p>Indicates an entity is active, therefore it will be listed as an option within the Disclosure page.</p>
	<p>Indicates an entity is not active, therefore it will not be listed as available within the Disclosure page.</p>
	<p>Each section contains a help icon. Once clicked, a series of steps will be listed in order to assist you in completing the section.</p>



## Contact Information

Questions? Email [COI@UTHSCSA.EDU](mailto:COI@UTHSCSA.EDU) or call 210-562-6838 | Technical Support: 210-567-8270 /  
210-562-5691