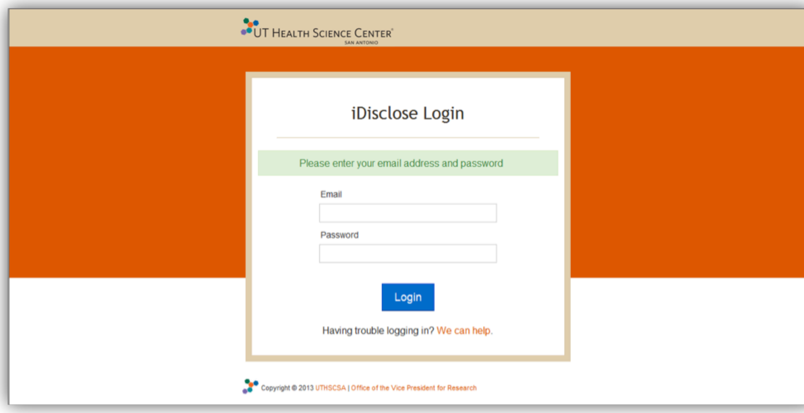
iDisclose v3.0 Step By Step (Single Page)

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**

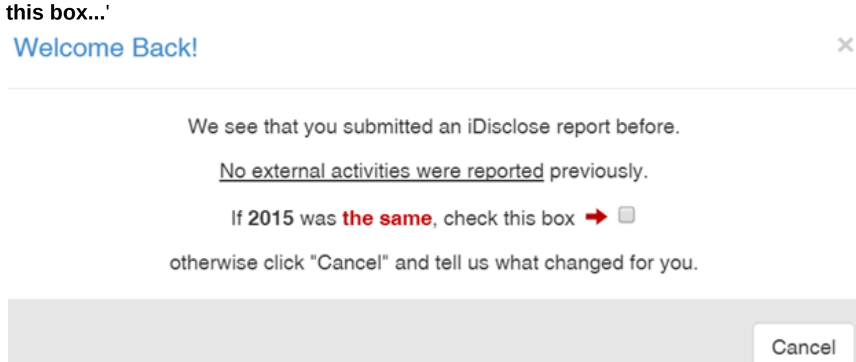


Disclosing as a Current Employee

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.
   1. 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...**'



5. If Cancel was selected, you will be directed to the Overview page. Answer the (4) Yes / No questions that are presented.
   1. Your relationship with for-profit entities
   2. Your relationship with non-profit entities
   3. Gift reporting as required by the State of Texas

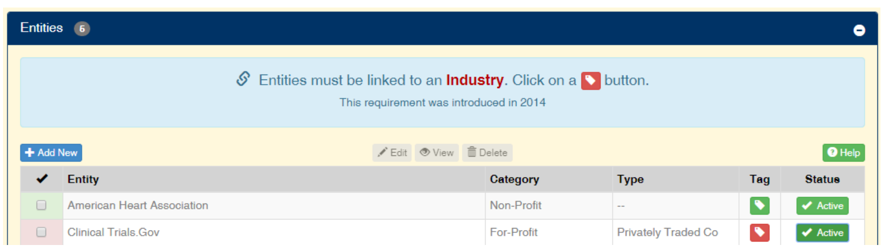
6. Your conduct of research as part of employment

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.

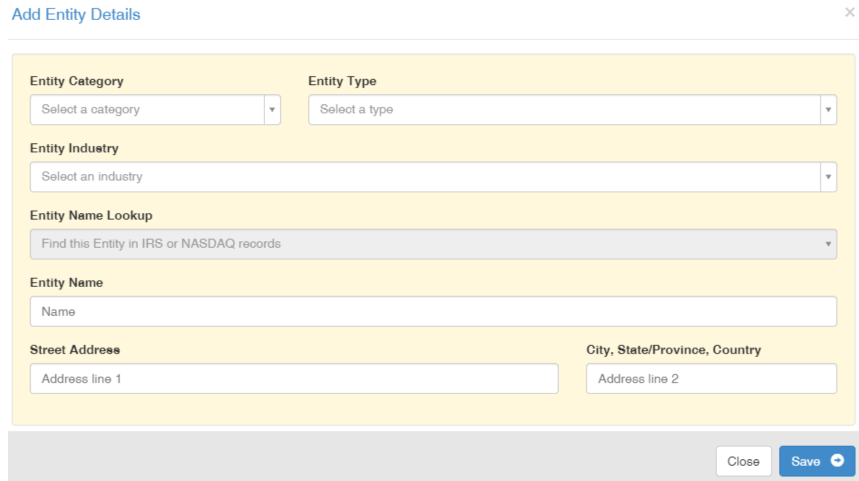


NOTE: Any entities you add now will be available for your use in the future. If you entered disclosures for CY 2013, your entities for those disclosures will be available.

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

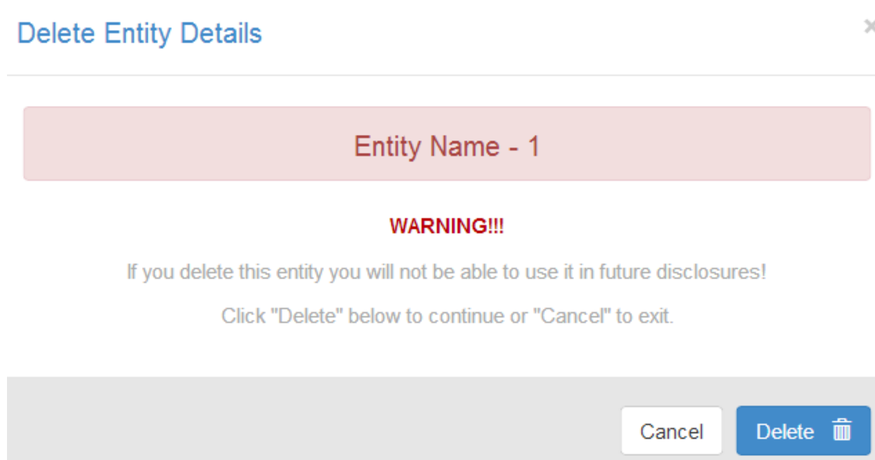


Edit an Entity

- 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.



- 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.

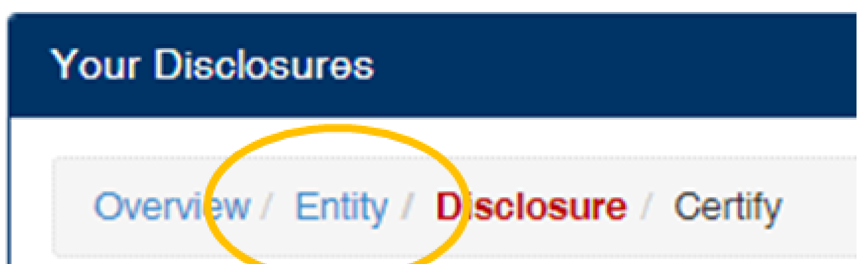
NOTES:
If you intend to use your entity in order to document future disclosures, Inactive the entity. If you delete, you will not be able to retrieve what has been deleted.

Menus & Icons

	Allows you to edit an Entity.
	Deletes an Entity.
	Allows you to view your Entity within a browser window.
✔ Active	Allow your Entity to be displayed as an option within the Disclosures page.
✖ Inactive	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.***



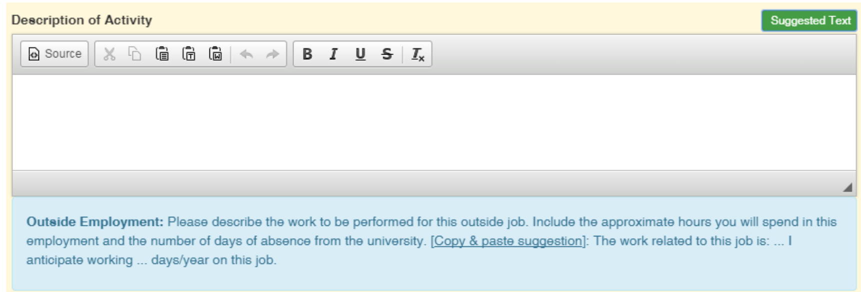
A disclosure contains the details of your activities with an outside entity. The first time you open this window there will be no disclosures to display.

Add a Disclosure

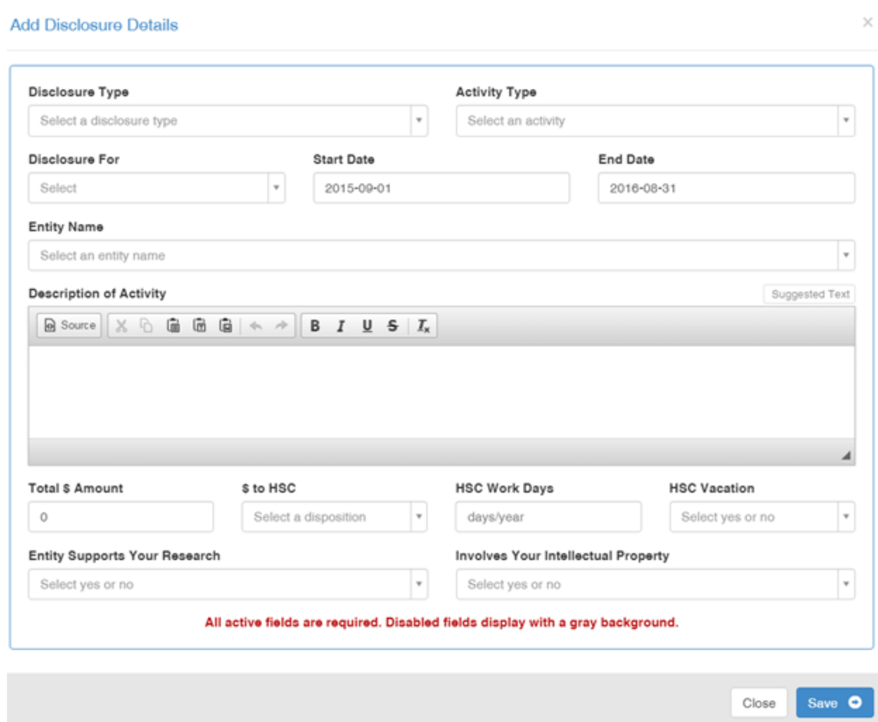
To proceed with creating a disclosure, complete all fields:

- Click + Add New 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



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

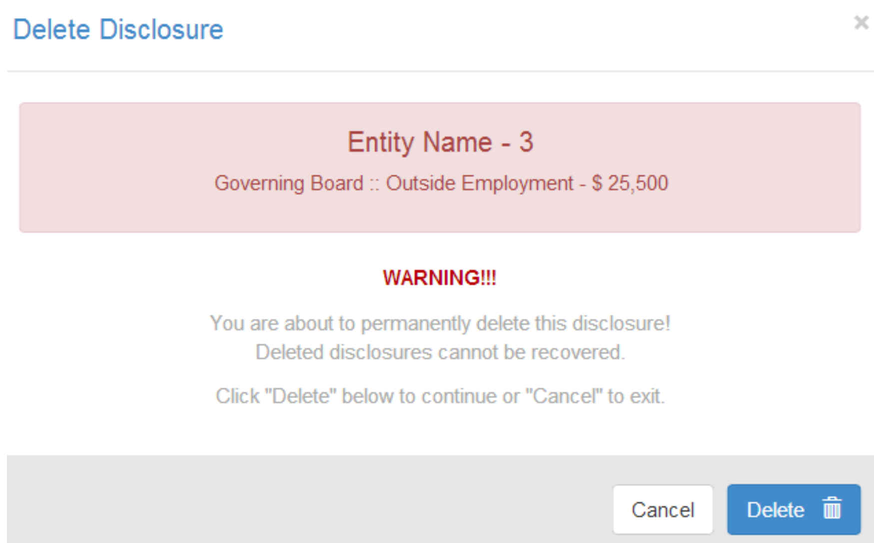
Edit a Disclosure

- 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.



- 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.

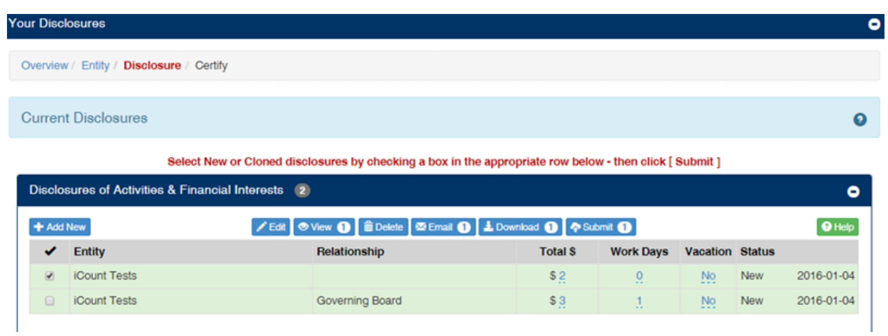
NOTES: About editing and deleting a disclosure:

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 you Disclosures

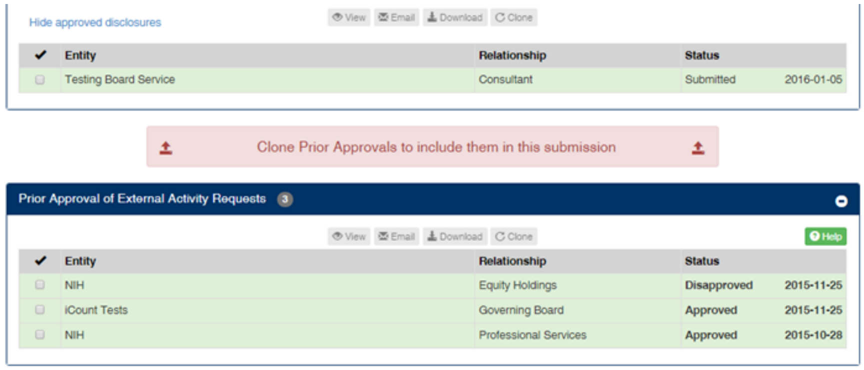
Once you have entered at least one disclosure you will be able to submit.

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.



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



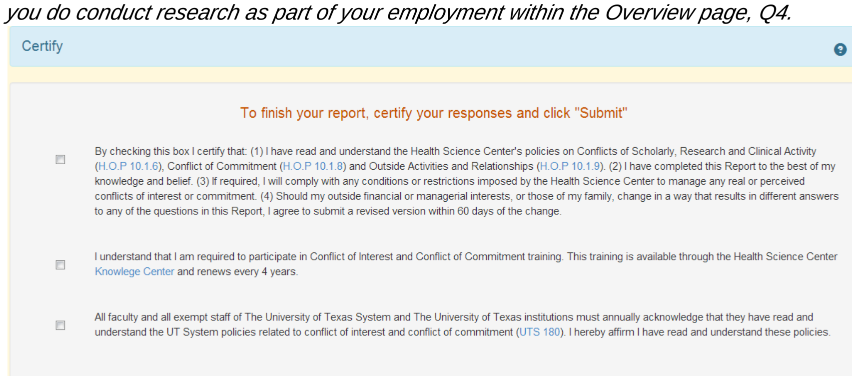
To clone:

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.

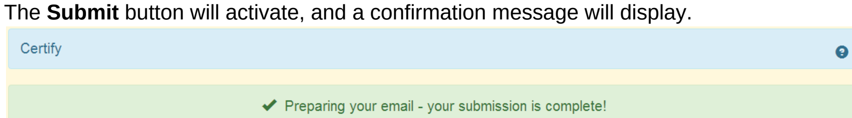
Step 4 - Certify

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.*



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

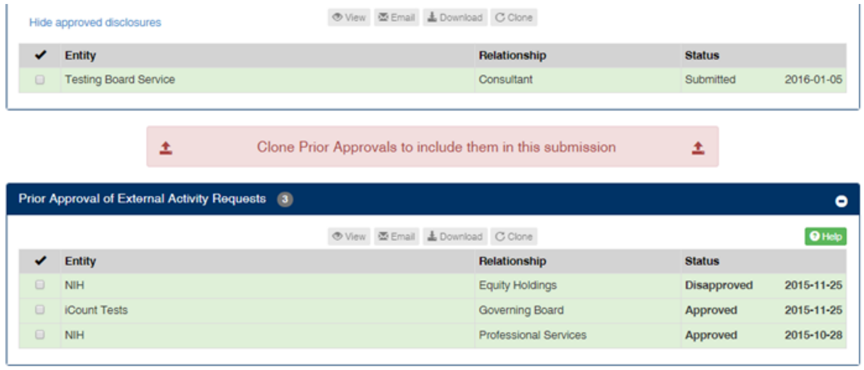


3. Once you submit your report, your session in the iDisclose system will automatically end.
4. If you entered disclosures, you will receive two emails. One indicating your report was received and submitted successfully, and the second email with a PDF attachment of your report. If you did not enter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

Was a disclosure identified as requiring prior approval?

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



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3. You will then see the new row for the disclosure you cloned.
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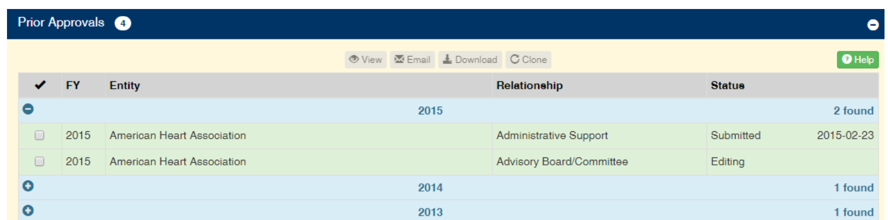
5. Click the blue Edit button in order to customize to the additional relationship with that particular entity.



Disclosing as a New Employee

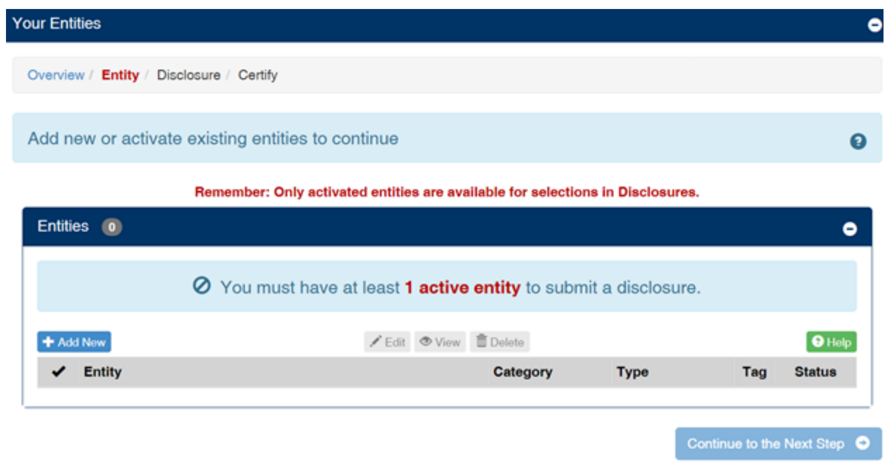
Step 1 - Start Here

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.
    1. Your relationship with for-profit entities
    2. Your relationship with non-profit entities
    3. Gift reporting as required by the State of Texas
    4. Do You conduct of research as part of employment

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

Step 2 - Entities

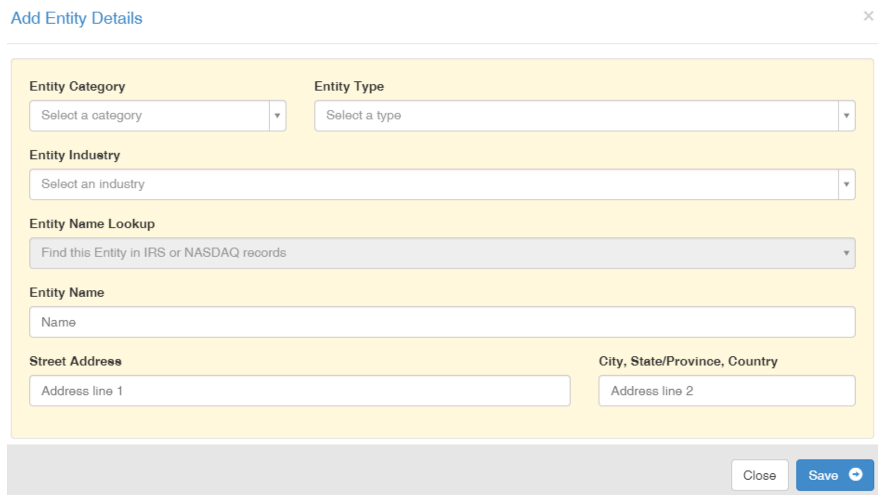
An entity is an individual, business, institution or organization that you interact with and with whom you have external activities to disclose. Before navigating to the disclosure page, you must have at least 1 Entity within your Entity List and it must be **active.**



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

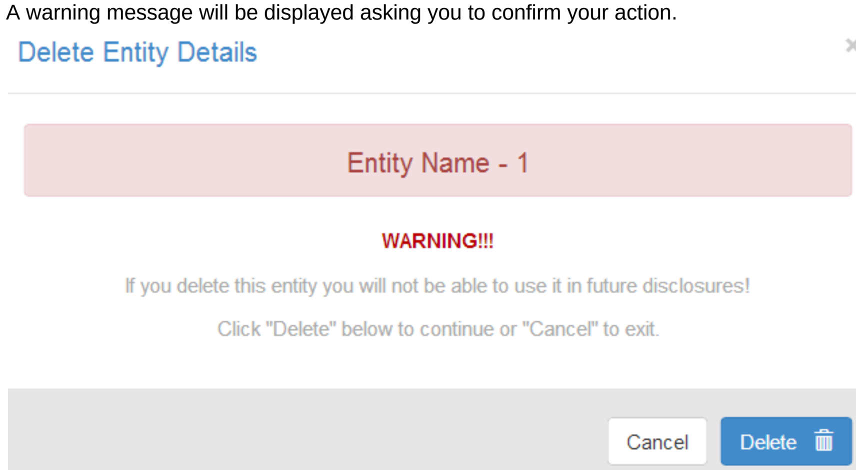


Edit an Entity

- 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.



- 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.

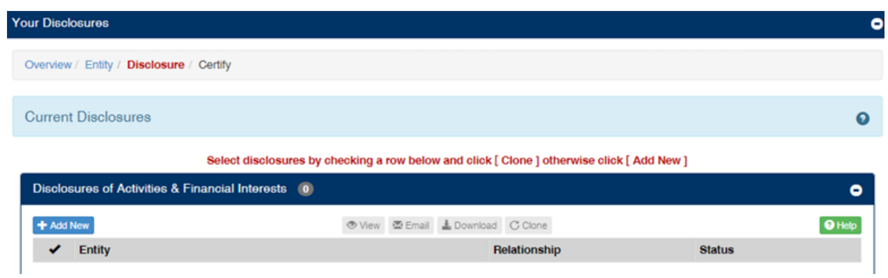
NOTES:
If you intend to use your entity in order to document future disclosures, Inactive the entity. If you delete, you will not be able to retrieve what has been deleted.

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.

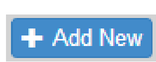
Step 3 - Disclosures

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.

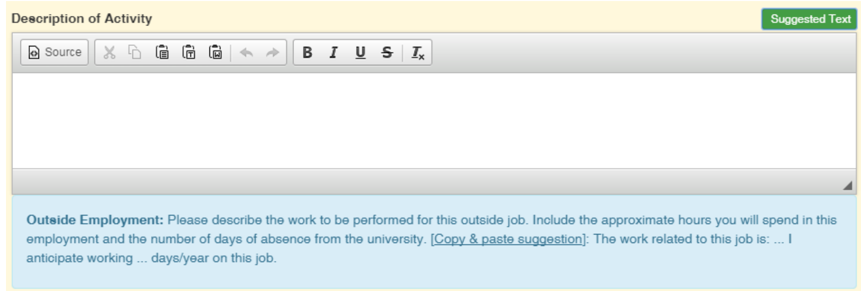


Add a Disclosure

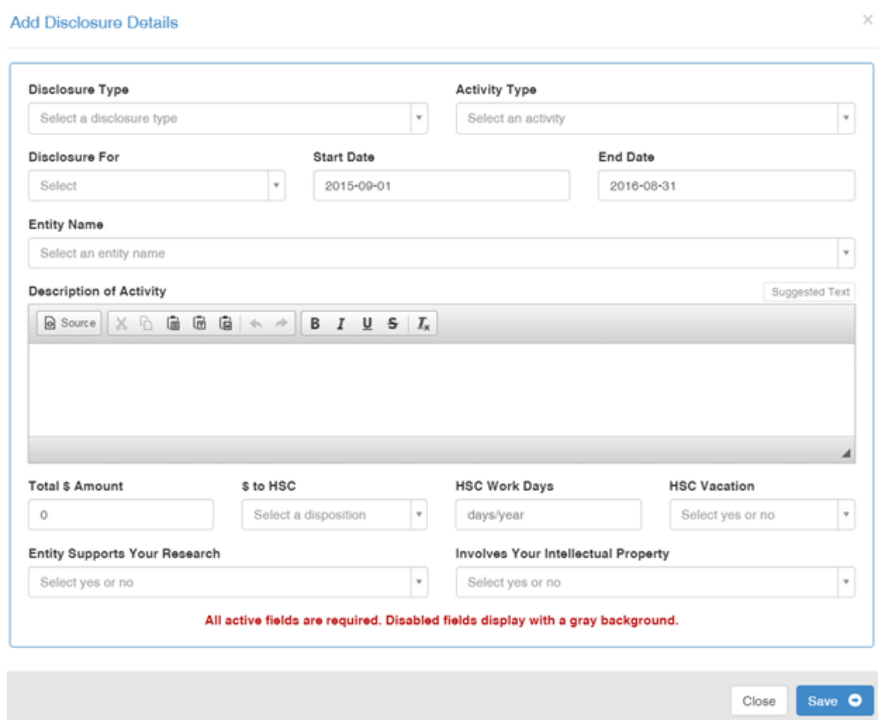
To proceed with creating a disclosure, complete all fields:

- 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



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



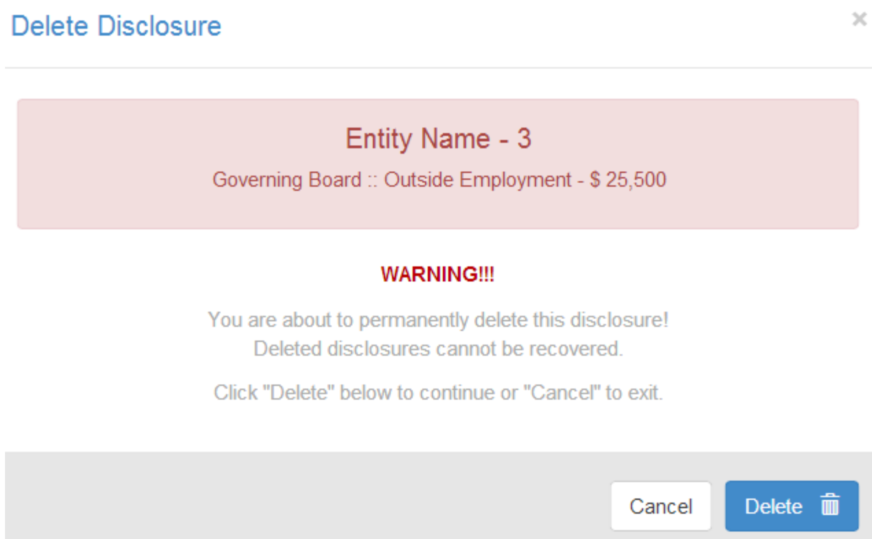
- Click Save when done. You will be directed back to the Disclosures page.

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.



- 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.

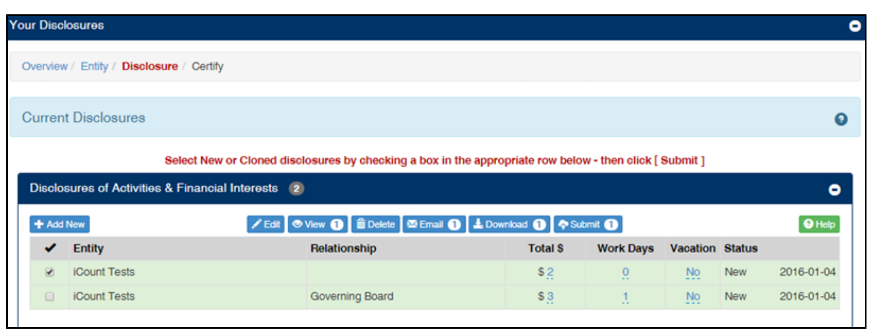
NOTES: About editing and deleting a disclosure:

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 you Disclosures

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

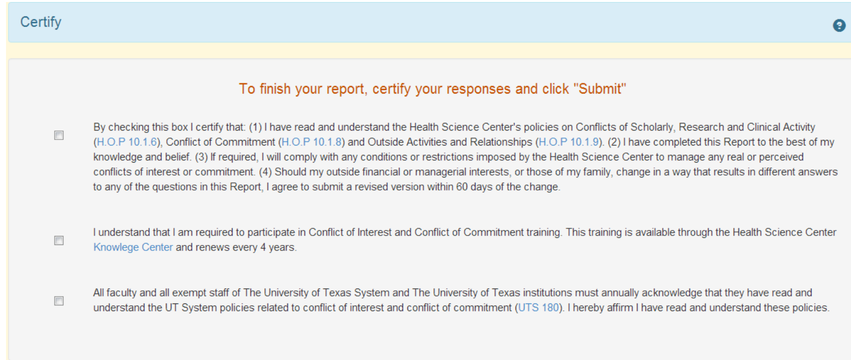
1. Select the disclosures you will be submitting by checking the first column. As you select Disclosures to be submitted, a numerical value will display on the Submit button indicating the number of disclosures you will be submitting.
2. Click the Submit button.



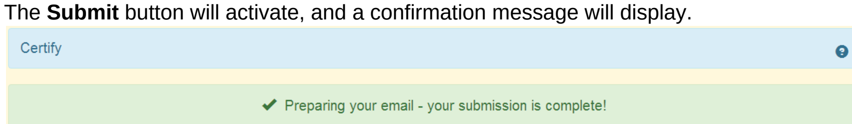
Step 4 - Certify

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.*



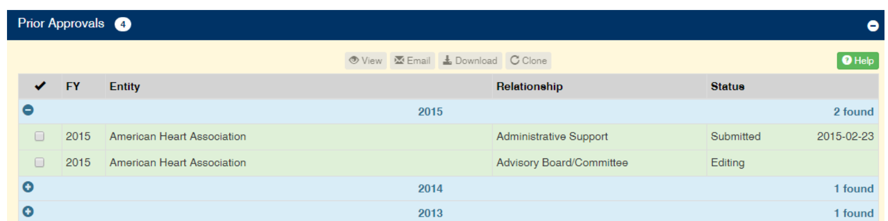
2. The **Submit** button will activate, and a confirmation message will display.



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.

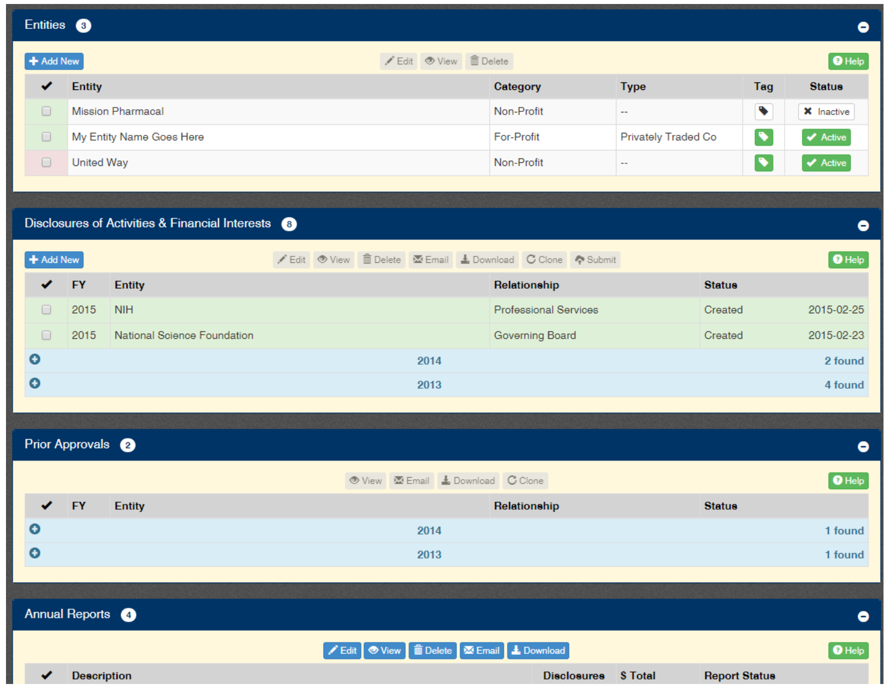


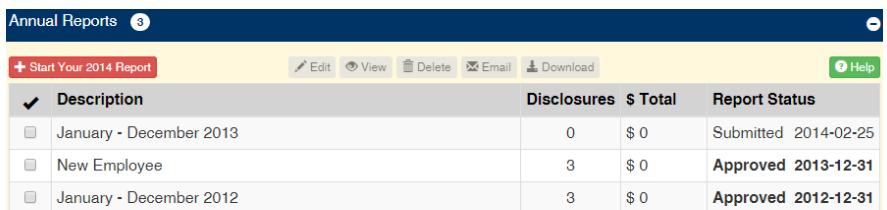
The iDisclose Dashboard

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*.

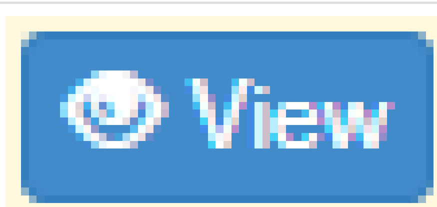
Sections Overview:

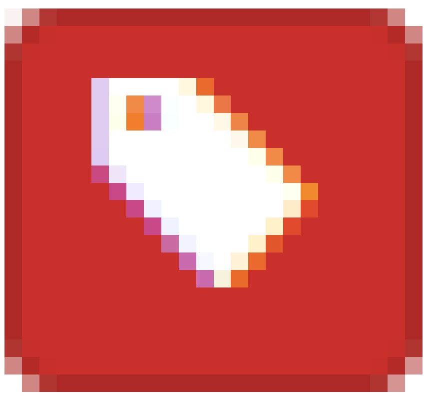
- **Entities** will display entities you have previously added to iDisclose. Reporting in 2015 provides additional fields in the entities section. Edit the entity and make active in order to use it in your 2015 reporting or in the future.
- **Disclosures of Activities & Financial Interests** will display 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.





Icons

Icon	Description
	Allows you to edit a report.
	Deletes a report.
	Allows you to view your report within a browser window.
	Allows you to email a PDF version of your

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

Contact Information

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