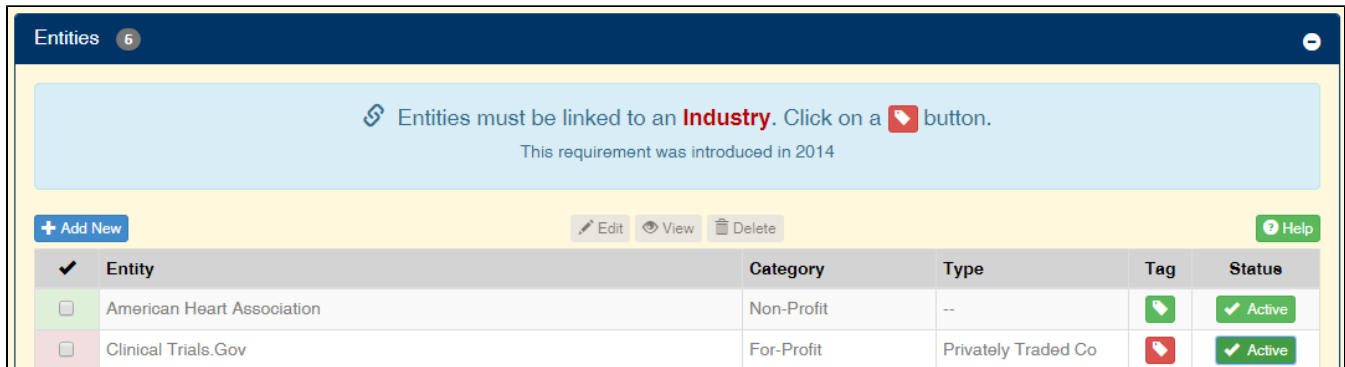


# My Entities

## Background

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	--		Active
<input type="checkbox"/> Clinical Trials.Gov	For-Profit	Privately Traded Co		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. If you entered disclosures for CY 2013, your entities for those disclosures will be available.

## Edit an Entity

If an entity will be used and it contains a red background by the check box or red tag icon:

- Click the check box for the entity
- Click the Edit button
- The information about that entity will be appear in the fields in the bottom half of the window. *Items that may need to be edited: address, city, state or Industry type.*
- Make your changes and select the blue **Save** button.

## 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

## 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.





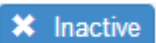

- If the Entity Status shows the Active button, your entity is Active.

- 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.

## Dashboard

The dashboard will also contain a view of all entities. From the dashboard, you also have the flexibility to add or edit entities.