Single Disclosures; Prior Approvals - External Activities, Employment, Consulting, Board Membership, or Related Activities

iDisclose will be used to submit your single disclosures of prior approval for External Activities, Employment, Consulting, Board Membership, or Related Activities. Once you submit your request your disclosure will be routed to the Conflict of Interest (COI) office. The COI manager will review and if your disclosure is identified as a prior approval it will be routed to the appropriate individual for approval within your area. That individual will review and then route to the Chief Financial Officer. This individual will be the final approval. You can review the status of your request by viewing your dashboard, section Prior Approvals.

A prior approval (single disclosure) must be approved by your department chair, Dean (or VP) and the President's delegate before the activity begins. Activities that require prior approval are approved annually on a fiscal year basis (September 1 – August 31).

- Activate/Inactivate an Entity

Submitting Prior Approvals (Single Disclosure)

Step 1 - Start Here

1. Access iDisclose https://vpr.uthscsa.edu/iDisclose/
2. From the home page, select an option from **Common** or **Other Activities** to initiate the process.

1. During Annual Reporting season:
    1. **Common** and **Other Activities** will be grayed out.
    2. Log in with the green button, 'Submit your 2015 Annual Report' - For assistance, go to Log on during Annual Reporting.

3. Review the page details that display, and click **Continue**
4. Log in with your email address and domain password

Step 2 - Entities

Once you have logged in, you will see **Your 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: If you have previously submitted an annual disclosure you will see a list of entities. The list of entities available to you during Annual Reporting is the same list during Single Disclosure reporting for Common Activities.You have the ability to use (editing may be required) an existing entity, or add a new entity.

Add an Entity

- Click **+ Add New** 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 be appear 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.
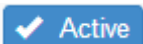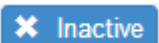
Activate/Inactivate an Entity

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.
✔ 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

A disclosure contains the details of your activities with an outside entity. If you previously submitted an annual report and disclosure(s) were identified as requiring Prior Approval, you will see the disclosure(s) in in the Prior Approvals section. From this section, you will have the ability to clone previous year's prior approvals.

All disclosures that were flagged as Prior Approval during Annual Reporting will be available in the Disclosures page and will be ready to submit. If the disclosures listed need edit see **Edit a Disclosure**. If you need to add additional disclosures, see **Add a Disclosure.**

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 be appear in the fields in the bottom half of the window.
- Make your changes and select the blue **Save** button.

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.
- Disclosure For
    - Myself, Spouse, Dependent child, Parent, Unmarried Adult (living with you), Other
- Start and End date
- Entity Name - select from the list. All active entities will be displayed.
- Description of Activity
- Total $ Amount
- Disposition
    - Kept It, Turned it In, Not Applicable, Other

- HSC Work Days
- Vacation Days
- Entity Supports Your Research?
- Involves Intellectual Property?

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

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.

Clone from Prior Approvals

- Expand the year(s) to locate prior approval
- Select a disclosure
- Click clone
- Edit as necessary

Submit you Disclosures

Once you have entered at least one disclosure you must select the disclosures you would like to submit. From the Disclosure of Activities & Financial Interest page:

1. Select the disclosure(s) you will be submitting by checking the first column.
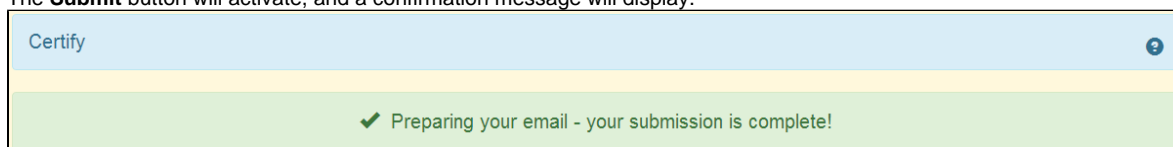2. Click the Submit or Continue to the Next Step Button

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.

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

3. Once you submit your disclosures for External Activities, Employment, Consulting, Board Membership, or Related Activities, your session in the iDisclose system will automatically end.
4. 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.
5. Once action has been taken (Approved, Disapproved, Sent back to you) you will receive an email notification.