

# iDisclose v3.2 Dashboard & Wizard

## Wizard

iDisclose v3.0 wizard is updated to help navigate you through completing your annual report and assist in submitting single disclosures. The wizard is initiated from the iDisclose v3.0 webpage. Once an item is selected from one of three areas: **Annual Reporting**, **Common Activities** or **Other Activities** the wizard will be initiated.

Annual Reporting	Common Activities	Other Activities
Select which reporting process you would like to complete from the list below.	These activities usually require prior approval and must be renewed annually.	These activities rarely require prior approval unless there is a conflict of interest.
<a href="#">New Employee Report</a> <b>Submit Your 2015 Annual Report</b> To date: 5 submissions	<a href="#">Compensation</a> <a href="#">Board Service</a> <a href="#">Outside Employment</a> <a href="#">Reimbursed Travel Only</a>	<a href="#">Significant Business Interest</a> <a href="#">Intellectual Property / Royalties</a> <a href="#">Equity</a> <a href="#">Received a gift (&gt; \$ 250)</a> <a href="#">Other Activity</a>

During Annual Reporting (January - March 1), the four pages to complete: Overview, Entities, Disclosures, and Certify. \*If you have no disclosures to make during Annual Reporting, you will only need to complete the Overview and Certify page.

If you are submitting a single disclosure which falls within **Common** or **Other Activities**, the three pages to complete: Entities, Disclosures and Certify.

### Log in During Annual Reporting:


The Annual Reporting (January - March 1) links within Common and Other Activities will be disabled. All user should log in through the Annual Reporting section. Click here for login instructions, [Log on during Annual Reporting](#).

## Dashboard

The dashboard is an overview of your current and past activities you have disclosed. From the dashboard, you have the ability to manage your entities, view disclosures for current and past reporting seasons, view disclosures which require

Prior Approval, and view past reports.

Upon accessing the Dashboard, the sections (Entities, Disclosures of Activities & Financial Interests, Prior Approval of External Activity

Requests and Annual Reports will be minimized. To expand, click the  icon.

Entities <b>3</b>	+
Disclosures of Activities & Financial Interests <b>4</b>	+
Prior Approval of External Activity Requests <b>2</b>	+
Annual Reports <b>3</b>	+

Entities 3					
+ Add New					
Edit View Delete Help					
Entity	Category	Type	Tag	Status	
<input type="checkbox"/> Marketing Zune	For-Profit	Privately Traded Co		<input checked="" type="checkbox"/> Active	
<input type="checkbox"/> NIH	Non-Profit	--		<input checked="" type="checkbox"/> Active	
<input type="checkbox"/> St. John Berchmans Catholic church	Non-Profit	--		<input checked="" type="checkbox"/> Inactive	

Disclosures of Activities & Financial Interests 4					
+ Add New					
Edit View Delete Email Download Clone Submit Help					
Entity	Relationship	Status			
<input type="checkbox"/> Marketing Zune	Governing Board	New	2015-10-19		
<input type="checkbox"/> Marketing Zune	Administrative Support	New	2015-10-19		
<input type="checkbox"/> Marketing Zune	Expert Witness	New	2015-10-19		
<input type="checkbox"/> Marketing Zune	Consultant	New	2015-10-19		

View Email Download Clone

Entity	Relationship	Status
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Prior Approval of External Activity Requests 2					
View Email Download Clone Help					
Entity	Relationship	Status			
<input type="checkbox"/> NIH	Administrative Support	ReadyForReview	2015-10-15		
<input type="checkbox"/> Marketing Zune	Consultant	ReadyForReview	2015-10-15		

Annual Reports 3					
Edit View Delete Email Download Help					
Description	Disclosures	\$ Total	Report Status		
<input type="checkbox"/> January - December 2014	1	\$ 0	Approved	2015-06-17	
<input type="checkbox"/> January - December 2013	0	\$ 0	Approved	2014-04-18	
<i>January - December 2012 - Not available online</i>	3	\$ 11,351,322	Approved	2012-12-31	

**Sections Overview:**

- **Entities** will display entities you have previously added to iDisclose. To add a disclosure for the Entity, it must be active and Edit the entity and make it active. If your entity contains red in the row, you must edit the entity before it will populate in the Disclosures of Activities & Financial Interests section for use.
  - **Disclosures of Activities & Financial Interests** will display disclosures for the different reporting periods. All prior years disclosures can be cloned. Keep in mind, the Entity must still be available. If the entity was deleted, it must be added again.
  - **Prior Approval of External Activity Requests** will display all disclosures which are designated by the COI office as Prior Approvals. If a disclosure is identified as a prior approval, it will be designated in this section. Only after the COI office makes a Prior Approval Determination will the disclosure be displayed in this section.
- Annual Reports** will contain all past reports and during the reporting season you will be able to disclose for the prior calendar year. In this section, you will have the option to view, print and email past reports. Any reports prior to CY 2012 will not be available for viewing. Within the Annual Reports section, you will also have a button to begin a report once annual reporting season is open, usually at the beginning of the current calendar year. All individuals required to disclose will receive an email from the Conflict of Interest Office indicating annual reporting season is open.

Annual Reports 4

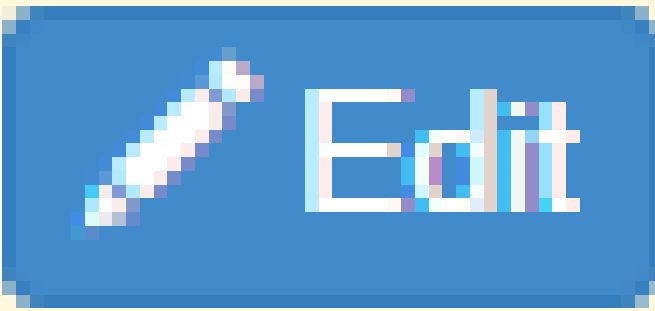




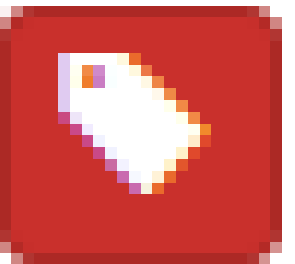



+ Your 2014 Report

Edit View Delete Email Download

Help

✓ Description Disclosures \$ Total Report Status

## Icons

Icons		
		<p>When a item like 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>



Allows you to view your report within a browser window.








Allows you to email a PDF version of your report.



Allow you to download a PDF version of your report.

## Help

Each page contains a question mark and help icon  . Once  is clicked, the blue header bar will expand with additional information. Clicking  will provide you with steps to complete the section you are on.

Overview 

- Your relationship with for-profit entities:**  
This question is about your interactions with entities that operate for-profit. If you work for another business such as HEB or Walmart, or if you donate your time to such an entity, your answer should be YES.
- Your relationship with non-profit organizations:**  
This question is about your interactions with **non-profit** organizations, such as other Universities, Professional Societies, charities, local, state or federal government. If you interact with these kind of entities answer YES.
- Gift reporting as required by the State of Texas:**  
This is not about gifts from family. If you received gifts valued at \$250 or more from someone else answer YES. This question is particularly important if the gift might be interpreted as relating to your duties at the UT HSC.
- Research:**  
If research is part of you job at the UT HSC, or if you are paid as a researcher by an entity you interact with, your answer should be YES.