

# Click COI Xpress Faculty User Guide

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# Using the COI System

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## In This Section:

- ✓ Submitting your annual disclosure for review
- ✓ Editing Draft Disclosure Certification Forms
- ✓ Managing Individual Disclosures
- ✓ Using the Disclosure Certification Workspace
- ✓ Creating a Print-out of your Disclosure Certification Forms
- ✓ Updating your Disclosures
- ✓ Completing Requested Changes

## Submitting Your Annual Disclosure for Review

As part of the research community, you are required to submit an annual disclosure. When/if your interests change during the year, you must update your disclosures to reflect those changes.

When it's time for your annual disclosure, you should receive an e-mail from the COI office. You can log into the COI system and see the annual disclosure in the Inbox of your personal page. Your personal page is the first page you see when you log into your site. It provides a dashboard for you to interact with your disclosures and manage your work. In the e-mail you receive, there is also a link directly to your annual disclosure.

When you finish the disclosure, it will need to be submitted to the COI committee for approval. If the disclosure is complete, you can submit it directly from the last page of the SmartForm. If you have not provided all the necessary information, you can wait and submit it at a later time.

To prepare for submitting your disclosure, you might want to collect the following:

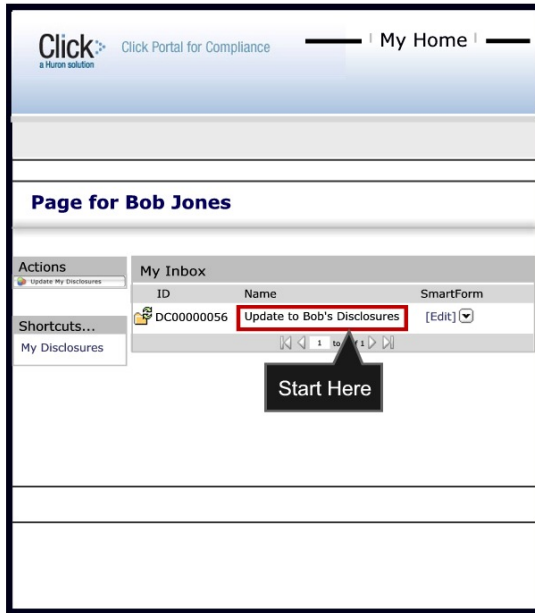
- Any consulting agreements you have signed this year
- Receipts from travel paid by outside companies
- Any stock option agreements
- Your stock portfolio summary
- Your IRS 1040 and/or 1099 forms.

Use the following steps to submit your annual disclosure for review.

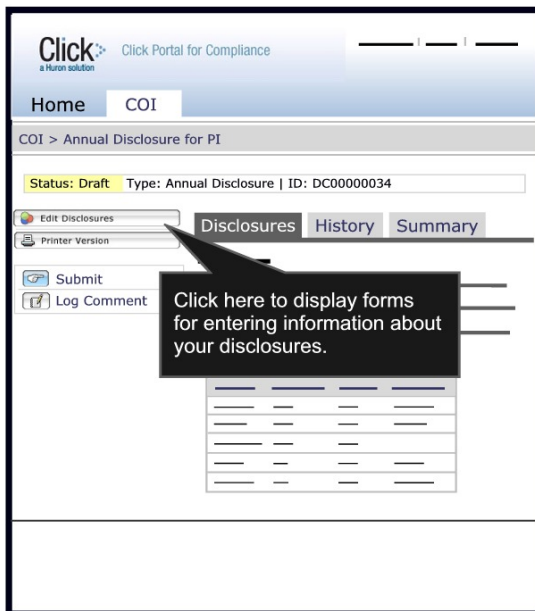
### To submit a disclosure for review

- 1.** Log on to your site and click **My Home** if you are not already there.  
*You can also click on the link within the e-mail you receive from the COI office. If you click on the link in your e-mail, you'll go directly to the disclosure certification workspace. You can skip step 1-2 of this procedure.*
- 2.** From the **Inbox** tab, click on the name of your annual disclosure to open it.

## Submitting Your Annual Disclosure for Review



3. From the disclosure certification workspace, click the **Edit Disclosures** button.



4. Use the provided form to answer questions about your responsibilities at your institution. When you're done, click **Continue**.

**Annual Certification for Eleonore Moran**

The following questions apply to all activities, inpatient or outpatient. Reference to visits at this institution include any activities at any part of this institution's properties, including hospitals, clinics, and leased office space.

- \* Do you write orders and/or prescribe items or services for patients who visit this institution?**  
☒ Yes ☐ No [Clear](#)
- \* Do you influence or decide which vendor or manufacturer or service provider, supplier are chosen for purchase, lease, use or acquisition of any items or services at this institution?**  
☒ Yes ☐ No [Clear](#)  
 If Yes, please describe your role in decision-making or in influencing decisions:  
 test
- \* Are you involved in any regulatory or policy activities on behalf of this institution?**  
☒ Yes ☐ No [Clear](#)  
 If Yes, Which:  
 test
- \* Do you employ or supervise anyone known to you to be related to you by blood, adoption, or marriage, at this institution?**  
☒ Yes ☐ No [Clear](#)  
 If Yes, name the person, their title, your supervisory relationship to the person at work and your family relationship to the person and any management plans currently in place:  
 test
- \* Do you hold a position of executive leadership at this institution?**  
☐ Yes ☒ No [Clear](#)

Answer Yes/No questions to describe your responsibilities. The answers you provide help determine whether your disclosure(s) need to be reviewed.

- 5. Click the **New Disclosure** button to disclose information for a new organization.**

**Annual Certification for Eleonore Moran : Disclosure Details**

You need to disclose any financial relationship with an external company or organization where you or an immediate family member received remuneration or if you hold equity in said company. On this page, you will be required to provide information on each company / external organization with which you have a financial relationship. If the relationship has not previously been disclosed, click on the "New Disclosure" button. If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure to update.

1. [New Disclosure](#)

Disclosures Under Review:	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
<a href="#">View/Edit</a>	Academic Affairs		Self	Reimbursements	\$50,000.00	yes	<a href="#">Remove</a>

2. **Previously Reviewed Disclosures**  
[Modify](#) [View](#) [Organizat](#)  
 There are no items to display

Click here to begin adding disclosure information for a new organization.

- 6. In the **Select the External Organization** box, start typing the name of the organization for this disclosure. The system will find a match as you type. When you are done entering the organization, click **OK**.**

*If there is no match, you can manually type the name of the organization in the bottom box on this form.*

## Submitting Your Annual Disclosure for Review

Create New Disclosure

Select the external organization this disclosure is for:

Select...

If you are unable to find the organization, please enter as text below:

Start typing the name of the organization here and the system will find it. If there is no matching organization, you can type it in the box below.

OK Cancel

7. Click **Continue** to move through each form presented. When you get to the end of the disclosure forms, you should see a disclosure summary that captures all the information you've provided into a table.

*It looks like this.*

Compensation Type	Dollar Value
Stock Equity	\$30,000.00
Options Equity	
Consulting, Advising, and Speaking	
Editorial	
License and Royalty	
Reimbursements	
Board of Directors	
<b>Total Value</b>	<b>\$30,000.00</b>

<< Back Save | Exit | Hide/Show Errors | Print... | Jump To: Disclosure Summary Finish

8. Click **Finish** to complete disclosure forms for the current organization.
- When you're done, you'll return to your certification forms to complete the submission process.*
9. If you need to disclosure information for a different organization, click the **New Disclosure** button again and repeat the above steps. If you have nothing further to disclose, click **Continue** to complete the certification forms.
10. When you get to the last page, a certification assurance message is displayed. If you are ready to submit your disclosure for review, click the check box at the bottom the form and click **Finish**.

<< Back Save | Exit | Hide/Show Errors | Print... | Jump To: Assurance and Certification Finish

Annual Certification for Eleonore Moran : Assurance and Certification

- I hereby acknowledge that I have read and understand the Financial Conflicts of Interest Policy.
- I affirm that the information provided is to the best of my knowledge true and complete and does not misstate any facts.
- I will provide any additional information as requested by the Office of Research Compliance.
- I agree to cooperate in the development of an appropriate management plan as required by ORC. I agree to comply with the terms and conditions contained in any management plan.

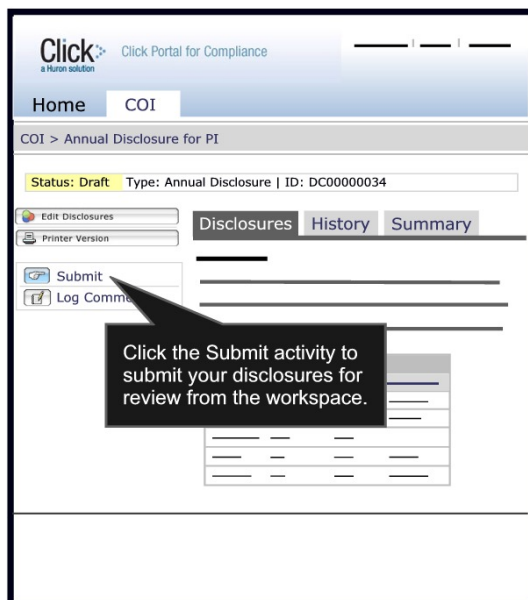
If you would like to submit your disclosures now, please check here: ☐

If you are ready to submit for review, select this box and click Finish. If not, save your changes and click Exit to close.

<< Back Save | Exit | Hide/Show Errors | Print... | Jump To: Assurance and Certification Finish

11. If you are not ready to submit for review, you can come back and do it at a later time. Use the **Submit** activity to send your disclosures to the COI office for review.





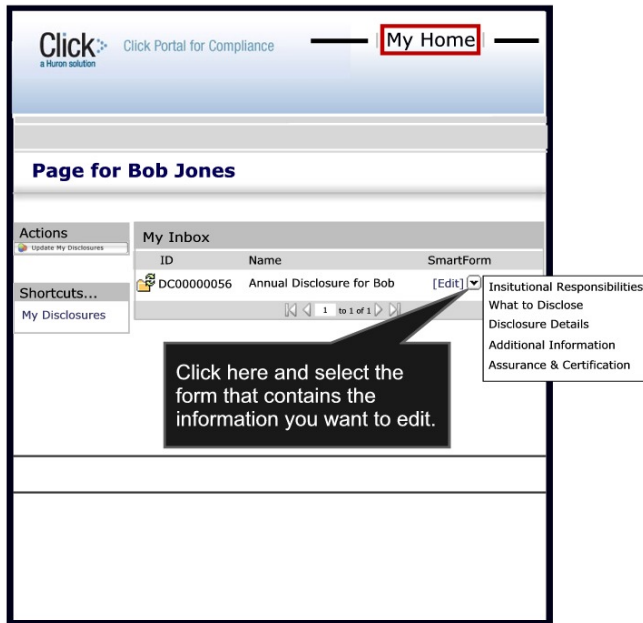
## Editing Draft Disclosure Certification Forms

Sometimes you might not have all the necessary information you need to complete your entire conflict of interest disclosure. When filling out your COI forms, you can save your work at any time and come back later to complete it. Until the certification is submitted for review, the information is in an editable state. If there is a pending change request from the department of the COI office, you will also be able to edit and update information included in the disclosure review.

### To edit a draft disclosure certification

- 1.** Log on to your site and click **My Home** if you are not already there.
- 2.** From your **Inbox**, click on the arrow in the SmartForm column and select the form that contains the information you want to edit.

*If you don't see the disclosure certification you want to edit in your Inbox, it is not in a state where you can edit it.*



3. If the information you want to update is part of a specific disclosure, select the **Disclosure Details** form from the list.

*The Disclosure Details form looks like this:*

The screenshot shows the 'Annual Certification for Eleonore Moran : Disclosure Details' form. It includes instructions on how to disclose financial relationships. Below the instructions, there's a section titled 'Disclosures Under Review:'. It contains a table with the following columns: 'View/Edit', 'Organization', 'Is Public Company', 'Relationship', 'Disclosure Types', 'Total Value', 'Is Significant?', and 'Remove'. Two disclosure entries are listed. The first entry is for 'Click Commerce' with a total value of '\$30,000.00'. The second entry is for 'Academic A...' with a total value of '\$50,000.00'. Both entries have an 'Edit' button next to them. A callout box with an arrow pointing to the 'Edit' button for the second entry contains the text: 'Click Edit to modify information for disclosures that are currently under review.'

4. Click **Edit** next to the disclosure you want to modify.  
*Depending on where a disclosure is in the review cycle, you may or may not be able to make changes to it. For more information, see Managing Individual Disclosures.*
5. Click **Continue** to move through each form presented. When you get to the end of the disclosure forms, you should see a disclosure summary that captures all the information you've provided into a table.
6. Click **Finish** to complete disclosure forms for the current organization.  
*When you're done, you'll return to your certification forms to complete the submission process.*
7. If you have nothing further to disclose, click **Continue** to complete the disclosure certification forms.

8. When you get to the last page, a certification assurance message is displayed. If you are ready to submit your disclosure for review, click the check box at the bottom the form and click **Finish**.

*For more detailed information about the submission process, see [Submitting Your Annual Disclosure for Review](#) earlier in this guide.*

## Managing Individual Disclosures

If you have a financial relationship with a company or external organization, you are required to report the nature of that relationship in a disclosure. In the Click COI xPress system, you report information for each organization in its own disclosure. Then those individual disclosures are bundled into a project for review and certification by the COI office.

You manage individual disclosures on the Disclosure Details form. You can identify the state of each disclosure based on its location in this form. Depending on where each disclosure is in the review cycle, you may or may not be able to modify it.

### Adding New Disclosures

If you have never reported your relationship with an organization, you'll need to create a new disclosure for it. When you create a new disclosure, it is automatically associated with the certification project where you create it.

Annual Certification for Eleonore Moran : Disclosure Details

You need to disclose any financial relationship with an external company or organization where you or an immediate family member received remuneration or if you hold equity in said company. On this page, you will be required to provide information on each company / external organization with which you have a financial relationship. If the relationship has not previously been disclosed, click on the "New Disclosure" button. If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure to update.

1. [New Disclosure](#)

Disclosures Under Review:

View/Edit	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
<a href="#">View</a>	Academic Affairs		Self	Reimbursements	\$50,000.00	yes	<a href="#">[X]</a>

2. [Previously Reviewed Disclosure](#)

Modify View Organization

There are no items to display

Click here to begin adding disclosure information for a new organization.


### Editing Disclosures Under Review

If a disclosure is under review and the review is in a state where you can modify it, the disclosure appears with an Edit button next to it. If a disclosure is under review, but the review is in a state where someone else is working on it, the disclosure appears with a View button next to it and you cannot make changes.





## Managing Individual Disclosures

**Disclosure Update for Dena PI : Disclosure Details**










You need to disclose any financial relationship with an external company or organization where you or an immediate family member received remuneration or if you hold equity in said company. On this page, you will be required to provide information on each company / external organization with which you have a financial relationship. If the relationship has not previously been disclosed, click on the "New Disclosure" button. If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure to update.

1.  New Disclosure

**Disclosures Under Review:**

View/Edit	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
	Click Commerce	yes		none specified			
	Anesthesiology	no	Self	■ Board of directors compensation	\$100.00	no	

2. **Previously Reviewed Disclosures (click 'Modify' to enable editing):**

Modify	View	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
		BioFactura, Inc.	no	Self	■ Editorial compensation	\$900.00	no	
		Dena's Aspirin	no	Self	none specified	\$0.00	yes	
		Abbott Laboratories	yes	Self	■ Reimbursements ■ Consulting, advisory, or speaking compensation	\$3,500.00	no	

Use these buttons to view or edit disclosures that are currently under review.


## Editing Previously Reviewed Disclosures

If the nature of your relationship changes with an organization, you might need to go back and modify a previous disclosure. All of your disclosures are displayed on the Disclosure Details form. If it's been previously reviewed, it will appear at the bottom of the form. If you need to make changes to it, you can click the Modify icon next to a disclosure to move it into the current certification project and modify it.





As soon as you modify a previously reviewed disclosure, it becomes part of the current certification process. That means, the COI system will analyze your changes and determine whether they need to be sent to the COI office for review.

**Disclosure Update for Dena PI : Disclosure Details**










You need to disclose any financial relationship with an external company or organization where you or an immediate family member received remuneration or if you hold equity in said company. On this page, you will be required to provide information on each company / external organization with which you have a financial relationship. If the relationship has not previously been disclosed, click on the "New Disclosure" button. If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure to update.

1.  New Disclosure

**Disclosures Under Review:**


View/Edit	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
	Click Commerce	yes		none specified			
	Anesthesiology	no	Self	■ Board of directors compensation	\$100.00	no	

2. **Previously Reviewed Disclosures (click 'Modify' to enable editing):**





Modify	View	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
		BioFactura, Inc.	no	Self	■ Editorial compensation	\$900.00	no	
		Dena's Aspirin	no	Self	none specified	\$0.00	yes	
		Abbott Laboratories	yes	Self	■ Reimbursements ■ Consulting, advisory, or speaking compensation	\$3,500.00	no	

**Disclosure Update for Dena PI : Disclosure Details**







You need to disclose any financial relationship with an external company or organization where you or an immediate family member received remuneration or if you hold equity in said company. On this page, you will be required to provide information on each company / external organization with which you have a financial relationship. If the relationship has not previously been disclosed, click on the "New Disclosure" button. If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure to update.

1.  New Disclosure

**Disclosures Under Review:**

View/Edit	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
	BioFactura, Inc.	no	Self	■ Editorial compensation	\$900.00	no	
	Anesthesiology	no	Self	■ Board of directors compensation	\$100.00	no	

2. **Previously Reviewed Disclosures (click 'Modify' to enable editing):**

Modify	View	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
		Dena's Aspirin	no	Self	none specified	\$0.00	yes	
		Abbott Laboratories	yes	Self	■ Reimbursements ■ Consulting, advisory, or speaking compensation	\$3,500.00	no	

If a disclosure has already been reviewed, it will appear down here. Click the Modify icon to move it into the current review project.

When you click Modify, the disclosure moves up into this area. Click Edit to make changes to it.

## Removing Individual Disclosures

At some point, you might need to remove a disclosure from the system. When you no longer have any payments or equity with an organization, you can deactivate the disclosure associated with it.

You can deactivate a disclosure at any time. It doesn't matter whether the disclosure is part of the current certification project or not. Even if the disclosure is not in a state where you can edit it, you can still deactivate it.

When you deactivate a disclosure, it's not actually removed from the system. It goes into a state called Pending Removal. A COI Analyst must approve the deactivation before it's actually removed from your set of disclosures. Until the analyst approves it, you'll continue to see the disclosure in your list.

**Disclosure Update for Dena PI : Disclosure Details**

You need to disclose any financial relationship with an external company or organization where you or an immediate family member received remuneration or if you hold equity in said company.  
On this page, you will be required to provide information on each company / external organization with which you have a financial relationship.  
If the relationship has not previously been disclosed, click on the "New Disclosure" button.  
If the relationship has been previously disclosed, click on the "Modify" link next to the disclosure to update.

1.

**Disclosures Under Review:**

View/Edit	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
<input type="button" value="Edit"/>	Click Commerce	yes		none specified			<input type="button" value="X"/>
<input type="button" value="View"/>	Anesthesiology	no	Self	Boards			<input type="button" value="X"/>

2. **Previously Reviewed Disclosures (click 'Modify' to enable editing):**

Modify	View	Organization	Is Public Company	Relationship	Disclosure Types	Total Value	Is Significant?	Remove
<input type="button" value="Modify"/>	<input type="button" value="View"/>	BioFactura, Inc.	no	Self	Editorial		no	<input type="button" value="X"/>
<input type="button" value="Modify"/>	<input type="button" value="View"/>	Dena's Aspirin	no	Self	none specified	\$0.00	yes	<input type="button" value="X"/>
<input type="button" value="Modify"/>	<input type="button" value="View"/>	Abbott Laboratories	yes	Self	Reimbursements Consulting, advisory, or speaking compensation	\$3,500.00	no	<input type="button" value="X"/>

**Use the Remove icon to deactivate an individual disclosure.**

## Using the Disclosure Certification Workspace

Use the following picture to identify tools in the Disclosure Certification Workspace.

The screenshot shows the 'Click Portal for Compliance' interface for 'COI'. The breadcrumb trail is 'COI > Annual Disclosure for PI'. The status is 'Draft' and the type is 'Annual Disclosure' with ID 'DC00000034'. On the left sidebar, there are buttons for 'Edit Disclosures' (2), 'Printer Version' (5), 'Submit' (6), and 'Log Comment' (6). The main content area has tabs for 'Disclosures' (3), 'History' (3), and 'Summary' (4). Below the tabs is a table titled 'My Disclosures' (7) with columns for Organization, Relationship, and Total Value. The table contains several rows of data.

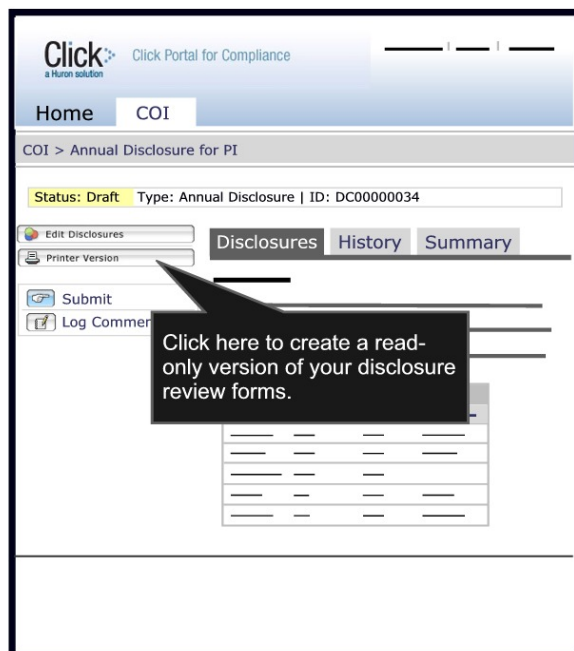
Workspace Tools	
Item	Description
1	Current State — This area always displays the current state status of your COI Disclosure. The Current State of the disclosure will update as it is processed in the system.
2	Edit COI Disclosure—This button launches the SmartForm for the current disclosure. This is the button you use to add or update information for a given disclosure when it is in an editable state.
3	History—This tab displays a summary of actions that have occurred on a disclosure review. It does not show a history of each individual disclosure. It only show a list of things that have happened as part of the review process.
4	Summary Information—This tab displays summary information related to your disclosure.
5	Printer Version— This button creates a read-only version of all your forms with any values you have currently provided. This is the easiest way for you to create a paper-based copy of your COI disclosure.
6	Activities—This is the set of actions you can perform on your COI disclosure. The actions you can perform are specific to your role and the current state of your disclosure.
7	My Disclosures— This table displays a list of all your individual disclosures. For each organization, you can see the type of disclosure, whether it's significant, and its total value.

## Creating a Print-out of your Disclosure Certification Forms

If you need a paper-based copy of your disclosure review, you can generate one using the COI System. Using the Printer-Friendly button in the workspace, you can create a read-only version of all your disclosure certification forms with any values you have currently provided.

To create a print-out of your disclosure(s)
<ol style="list-style-type: none"> <li>1. Log on to your site.</li> <li>2. In the top navigator, click <b>COI</b>.</li> <li>3. On the COI page, click the <b>My Certifications</b> tab. From the list of certifications, click the name of the one you want to open.</li> <li>4. Click the <b>Printer Version</b> button in your workspace.</li> </ol>





## Updating your Disclosures

If your interests change during the year, you must update your disclosures to reflect those changes. Depending on a number of factors, those changes may or may not need to be reviewed and certified by the COI office.

The easiest way to update your disclosures is using your personal page in the COI system. Use the Update My Disclosures button to add or remove any relevant information.

## Updating your Institutional Responsibilities

If your responsibilities change, you'll need to update that in the COI system. Your responsibilities (combined with other financial data) help determine whether a disclosure needs to be reviewed or not. So it's very important to keep that information up to date in the site. When you update your disclosures, you'll be asked whether you have any updates to your institutional responsibilities. If you don't indicate that you have updates, you will skip the form that enables you to update your responsibilities.

When you update your disclosures, the system will determine whether any new information will need to be reviewed by the COI office. If the updates qualify as significant, new disclosures that have not been previously submitted will be included in a certification review process. All other disclosures remain in their current state.

### To update your disclosures

- 1.** Log on to your site and click **My Home** if you are not already there.
- 2.** On the left side of your personal page, click the **Update My Disclosures** button.  
*When you update your disclosures, you create a new certification project in the system.  
 Depending on the type of updates, the system will determine whether it needs to be reviewed*

## Updating your Disclosures

by the COI office.

The screenshot shows the 'Click Portal for Compliance' interface. At the top, there's a header with the 'Click' logo and 'a Huron solution'. Below the header, there's a navigation bar with 'My Home'. The main content area is titled 'Page for Bob Jones'. On the left, there's a sidebar with 'Actions' and 'Shortcuts...'. The 'Actions' section contains a button labeled 'Update My Disclosures'. A callout box points to this button with the text: 'Click here to start a new certification project for updating your disclosures.' The 'Shortcuts...' section contains a link labeled 'My Disclosures'. The main content area also features a 'My Inbox' table with columns 'ID', 'Name', and 'SmartForm'. The table contains one row with ID 'DC00000056' and Name 'Update to Bob's Disclosures'. There are also '1' and 'No items' indicators below the table.

3. In the box provided, type a reason why you are updating your disclosures.

The screenshot shows the 'CreateAdHocDisclosureCertification' form. At the top, there's a title bar. Below it, there's a section titled '\* Please enter why you are updating your disclosures:' with a large text input area. A callout box points to the input area with the text: 'Click here to display a form that enables you to update your responsibilities.' Below the input area, there's a checkbox labeled 'Check the following box if your institutional responsibilities have changed (e.g. change in committee membership, promotion, now involved in clinical care or research):'. At the bottom right, there are 'OK' and 'Cancel' buttons.

4. At the bottom of the form, click the **Check the following box if your institutional responsibilities have changed** box.  
*If you don't select this box, you will skip the form that enables you to update your responsibilities.*
5. Use the provided form to answer questions about your responsibilities at your institution. When you're done, click **Save** to save your changes.



### Annual Certification for Eleonore Moran

The following questions apply to all activities, inpatient or outpatient. Reference to visits at this institution include any activities at any part of this institution's properties, including hospitals, clinics, and leased office space.

1. \* Do you write orders and/or prescribe items or services for patients who visit this institution?

☒ Yes ☐ No [Clear](#)

2. \* Do you influence or decide which vendor or manufacturer or service provider, supplier are chosen for purchase, lease, use or acquisition of any items or services at this institution?

☒ Yes ☐ No [Clear](#)

If Yes, please describe your role in decision-making or in influencing decisions:

test

3. \* Are you involved in any regulatory or policy activities on behalf of this institution?

☒ Yes ☐ No [Clear](#)

If Yes, Which:

test

4. \* Do you employ or supervise anyone known to you to be related to you by blood, adoption, or marriage, at this institution?

☒ Yes ☐ No [Clear](#)

If Yes, name the person, their title, your supervisory relationship to the person at work and your family relationship to the person and any management plans currently in place:

test

5. \* Do you hold a position of executive leadership at this institution?

☐ Yes ☒ No [Clear](#)

Answer Yes/No questions to describe your responsibilities. The answers you provide help determine whether your disclosure(s) need to be reviewed.

6. If you have disclosures to update, click **Continue** to move through the rest of the disclosure review forms. If you are done, click **Exit**.

*For more information on completing disclosure certification forms, see [Submitting Your Annual Disclosure for review](#).*

## Completing Requested Changes

At some point, you might be asked to make changes to your disclosure before it can be moved further along in the certification process. If you are asked to make changes, you will receive an e-mail from the system notifying you of the request. After you receive the e-mail, you'll need to log into the COI System and complete the changes.

### To complete requested changes

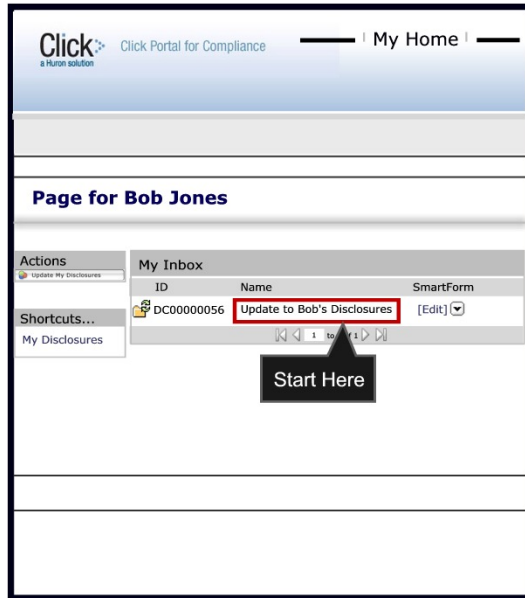
1. Log on to your site and click **My Home** if you are not already there.

*You can also click on the link within the e-mail you receive from the COI office. If you click on the link in your e-mail, you'll go directly to the disclosure certification workspace. You can skip step 1-2 of this procedure.*

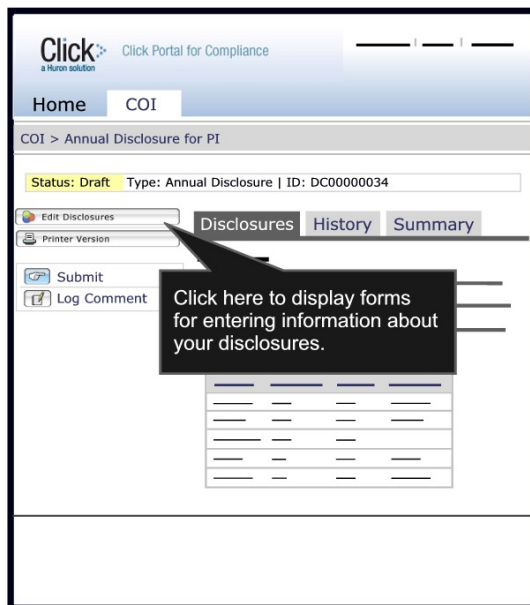
2. From the **Inbox** tab, click on the name of your disclosure certification project to open it.

*If the disclosure certification project is not in your Inbox, then it is not in a state where you can make changes.*

## Completing Requested Changes



3. From the disclosure certification workspace, click the **Edit Disclosures** button.



4. Make all the necessary changes to your disclosures and the disclosure certification forms. When you're done, save and exit the SmartForm.
5. In the disclosure certification workspace, click the **Submit Changes** activity to send your modifications back to the appropriate reviewers.

