

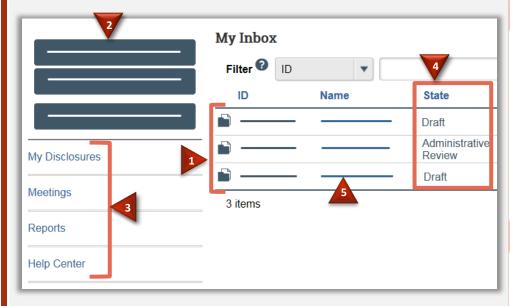
# COI Discloser Quick Reference

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Login: <a href="http://www.myResearch.stonybrook.edu">http://www.myResearch.stonybrook.edu</a>

# **Navigation and Basic Tasks**

When you first log in, you will be on the My Inbox page. This topic lists where to find certifications and the basic tasks you will perform.





#### Where do I find?

From My Inbox, you can find:

- **1. Certifications** that require you to take action.
- **2. Actions** you can perform such as **Update Disclosures**.
- **3. Shortcuts** that provide access to other items such as your disclosures or reports.

#### What do I do?

4. Review the state of certifications in My Inbox. The state gives a clue as to what to do next. For example, "Draft" means you haven't submitted the certification. You can finish and submit it for review.

See also <u>View Certification History</u> to see any reviewer comments.

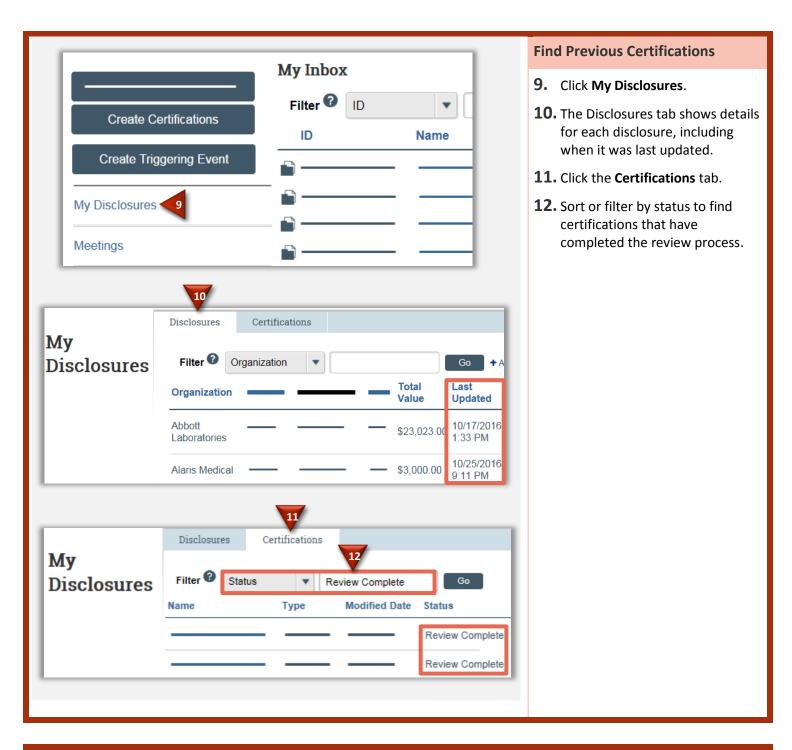
#### **Open a Certification**

- **5.** From the list of certifications in My Inbox, click the certification name.
- **6.** The certification workspace opens.

#### **View Certification History**

- **7.** From the certification workspace, click the **History** tab.
- **8.** The history lists the activity taken on a certification including any comments, attachments, or correspondence added.

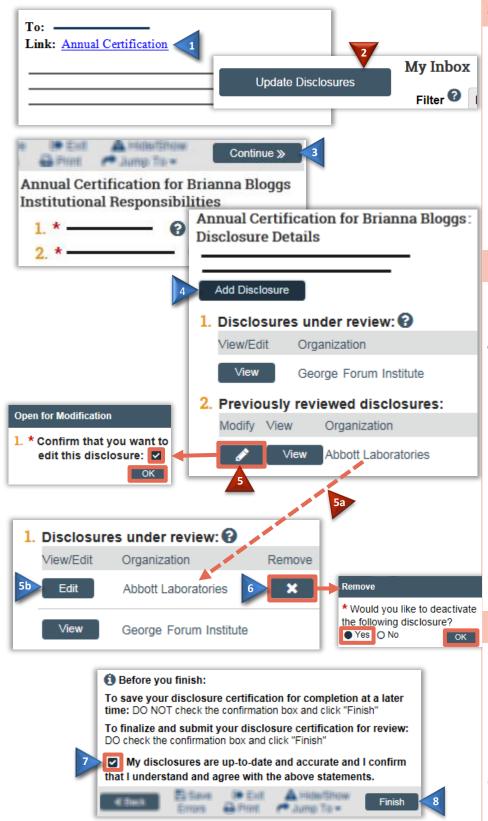
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# Before You Start Before you submit a certification, gather the following information. This will help you complete the forms. Any consulting agreements you have signed this year Receipts from travel paid by outside companies Any stock option agreements Your stock portfolio summary Your IRS 1040 and/or 1099 forms

### Submit an Annual Certification for Review

You will receive an e-mail to submit your certification. See **Before You Start** before performing the steps below.



#### Start the Certification

- **1.** Click the e-mail link to open the certification.
- 2. Alternatively, from My Inbox, click Update Disclosures.
- **3.** Complete each page and click **Continue** to advance.

**Note:** If you have submitted a certification before, the forms will show your previous answers. Update them appropriately.

#### **Update Disclosures**

Depending on your answers, the Disclosure Details page may appear.

- **4.** To add a disclosure, click **Add Disclosure**. Complete the pages and click **Finish** on the last page.
- To edit a previously reviewed disclosure, click the pencil and Confirm you want to edit it.
  - a. The disclosure moves to Disclosures under review.
  - b. Click Edit. The disclosure opens. Update the pages and click Finish on the last page.
- **6.** To remove a disclosure, click the red X. Select Yes and click OK.

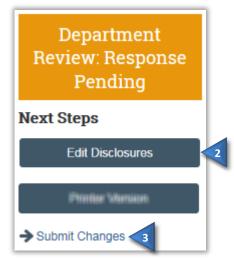
#### **Finish and Submit**

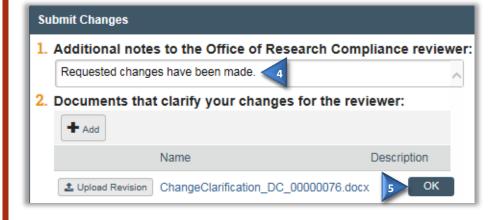
- **7.** On the last page, select the check box to submit the certification.
  - **Note:** To submit later, leave the check box blank. Use the Submit Disclosures action on the certification workspace to submit.
- **8.** Click **Finish**. You can log off the system.

# **Respond to Clarification or Change Requests**

If a reviewer has questions or requires you to change your certification, you will receive an e-mail indicating this. Review the request details and then respond to the request.







#### **Review the Request Details**

1. Read the e-mail for details about the clarification or change request. Click the e-mail link to open the certification.

If you no longer have the e-mail, see <u>Open a Certification</u> and then <u>View Certification History</u> to see the reviewer's comments.

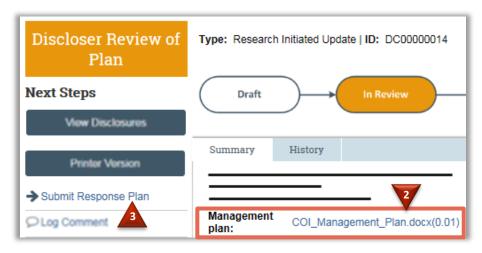
#### **Respond to the Request**

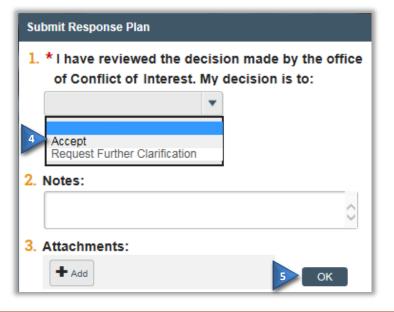
- 2. To update the certification, click Edit Disclosures. Make the requested changes in your certification and click Finish on the last page. Otherwise, go to the next step. You will be able to enter a response for the reviewer before submitting.
- 3. Click Submit Changes.
- **4.** (Optional) In the Additional notes box, type your response to the reviewer.
- **5.** Click **OK**. You can log off the system.

## **Respond to a Management Plan**

As a result of reviewing your certification, the COI office may issue you a plan to manage your conflicts of interest. Review the management plan and then submit your response to the plan.





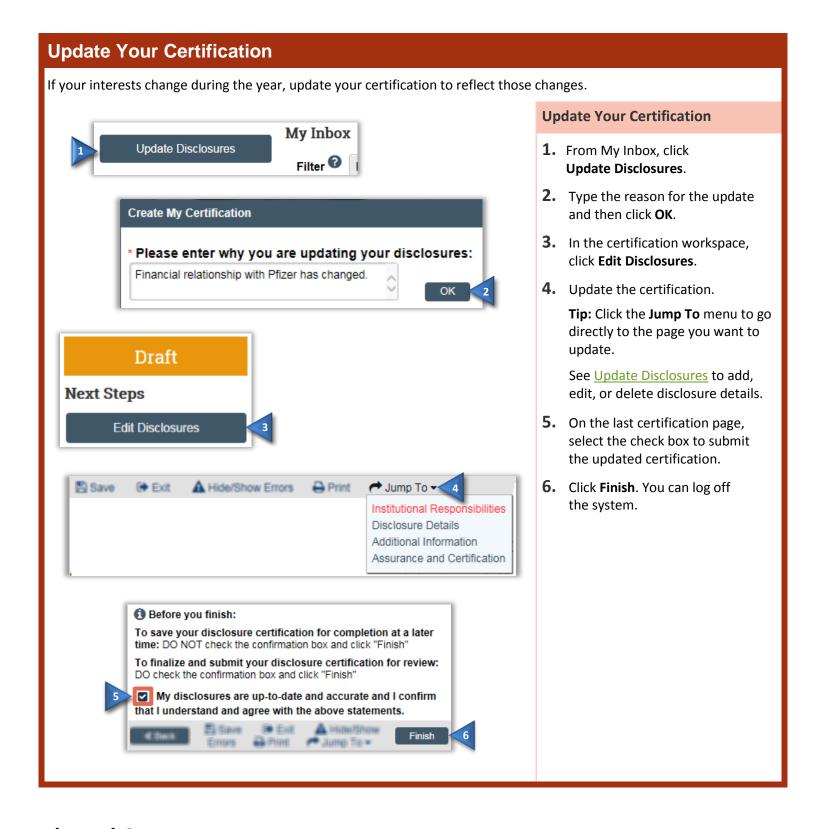


#### **Review the Management Plan**

- **1.** Click the certification link in the e-mail.
  - If you no longer have the e-mail, see Open a Certification and then View Certification History. Review the correspondence letter.
- 2. On the Disclosures workspace, click the management plan link to open the management plan and then review it.

#### **Submit Your Response**

- 3. Click Submit Response Plan.
- **4.** Select **Accept** to accept the management plan.
  - If you have questions about the management plan, select **Request Further Clarification** and type your questions in the Notes box. The certification will move back to the COI administrator's inbox to review
- **5.** Click **OK**. You can logoff the system.



# **Help and Contacts**

- For access to myResearch, please contact <u>ovpr-it@stonybrook.edu</u>
- For Annual Certification or COI Policy inquiries, please contact Susan Gasparo <a href="mailto:susan.gasparo@stonybrook.edu">susan.gasparo@stonybrook.edu</a> (631)632-1954.