



COI Discloser Quick Reference

Navigation and Basic Tasks	2
Before You Start	1
Submit an Annual Certification for Review	2
Respond to Clarification or Change Requests	3
Respond to a Management Plan	4
Update Your Certification	5

Login: <http://www.myResearch.stonybrook.edu>

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.

My Inbox

Filter [?] ID

ID	Name	State
		Draft
		Administrative Review
		Draft

3 items

My Disclosures
Meetings
Reports
Help Center

Where do I find?

From My Inbox, you can find:

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

What do I do?

- 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 [View Certification History](#) to see any reviewer comments.

Open a Certification

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

View Certification History

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

Draft → **In Review** → Under Mgmt Plan → Complete

Summary | **History** | Disclosures | Private Review Information | ...

Filter [?] Activity

Activity	Author	Activity Date
Submit Certification from Form	Walowitz, Francis	8/17/2016 9:17 AM
Disclosure Created: <i>Anesthesiology</i>	Walowitz, Francis	8/17/2016 9:15 AM

SmartForms

My Inbox

Create Certifications

Create Triggering Event

My Disclosures **9**

Meetings

Filter **ID**

ID	Name
_____	_____
_____	_____
_____	_____
_____	_____

Find Previous Certifications

9. Click **My Disclosures**.
10. The Disclosures tab shows details for each disclosure, including when it was last updated.
11. Click the **Certifications** tab.
12. Sort or filter by status to find certifications that have completed the review process.

My Disclosures

Disclosures | **Certifications**

Filter **Organization** **Go** + A

Organization	Total Value	Last Updated
Abbott Laboratories	\$23,023.00	10/17/2016 1:33 PM
Alaris Medical	\$3,000.00	10/25/2016 9:11 PM

My Disclosures

Disclosures | **Certifications**

Filter **Status** **Review Complete** **Go**

Name	Type	Modified Date	Status
_____	_____	_____	Review Complete
_____	_____	_____	Review Complete

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.
5. 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.

To: _____
Link: [Annual Certification](#) 1

2 Update Disclosures My Inbox Filter ?

3 Continue »

Annual Certification for Brianna Bloggs
Institutional Responsibilities

1. * _____ ?
2. * _____

4 Add Disclosure

Annual Certification for Brianna Bloggs: Disclosure Details

1. Disclosures under review: ?
View/Edit Organization
View George Forum Institute

2. Previously reviewed disclosures:
Modify View Organization
View Abbott Laboratories

Open for Modification

1. * Confirm that you want to edit this disclosure: OK

5

5a

5b Edit Abbott Laboratories 6 Remove

Remove


* Would you like to deactivate the following disclosure?
 Yes No OK

7 My disclosures are up-to-date and accurate and I confirm that I understand and agree with the above statements.

8 Finish


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.


To: _____
Link: [Annual Certification](#) 

**Department
Review: Response
Pending**

Next Steps


 [Edit Disclosures](#)

[Print Version](#)


 [Submit Changes](#)

Submit Changes

1. Additional notes to the Office of Research Compliance reviewer:



2. Documents that clarify your changes for the reviewer:

Name	Description
<input type="button" value="Upload Revision"/> ChangeClarification_DC_00000076.docx	 <input type="button" value="OK"/>

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 [Open a Certification](#) and then [View Certification History](#) 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.

To: _____
Link: [Annual Certification](#) 1

Discloser Review of Plan Type: Research Initiated Update | ID: DC00000014

Next Steps

View Disclosures

Printer Version

Submit Response Plan 3

Log Comment

Draft → In Review

Summary History

Management plan: COI_Management_Plan.docx(0.01) 2

Submit Response Plan

1. * I have reviewed the decision made by the office of Conflict of Interest. My decision is to:

4 Accept
Request Further Clarification

2. Notes:

3. Attachments:

+ Add 5 OK

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.

Update Your Certification

If your interests change during the year, update your certification to reflect those changes.

1. Update Disclosures

2. Create My Certification

* Please enter why you are updating your disclosures:

Financial relationship with Pfizer has changed.

OK

Draft

Next Steps

Edit Disclosures

Save Exit Hide/Show Errors Print Jump To

Institutional Responsibilities
Disclosure Details
Additional Information
Assurance and Certification

Before you finish:

To save your disclosure certification for completion at a later time: DO NOT check the confirmation box and click "Finish"

To finalize and submit your disclosure certification for review: DO check the confirmation box and click "Finish"

My disclosures are up-to-date and accurate and I confirm that I understand and agree with the above statements.

Back Save Exit Hide/Show Errors Print Jump To Finish

Update Your Certification

1. From My Inbox, click **Update Disclosures**.
2. Type the reason for the update and then click **OK**.
3. In the certification workspace, click **Edit Disclosures**.
4. Update the certification.
Tip: Click the **Jump To** menu to go directly to the page you want to update.
See [Update Disclosures](#) to add, edit, or delete disclosure details.
5. On the last certification page, select the check box to submit the updated certification.
6. Click **Finish**. You can log off the system.

Help and Contacts

- For access to myResearch, please contact ovpr-it@stonybrook.edu
- For Annual Certification or COI Policy inquiries, please contact Susan Gasparo susan.gasparo@stonybrook.edu (631)632-1954.