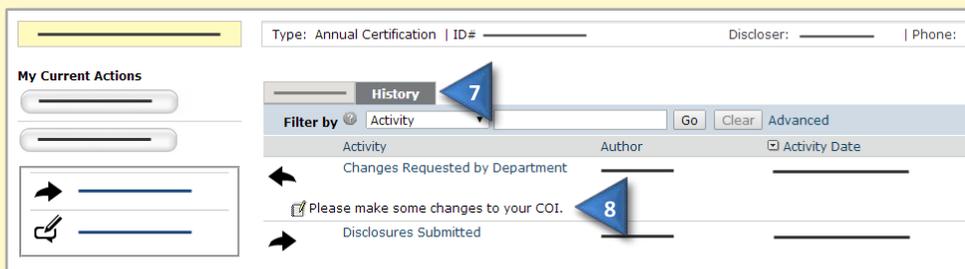**Huron**Education

Click® COI Discloser Quick Reference

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.
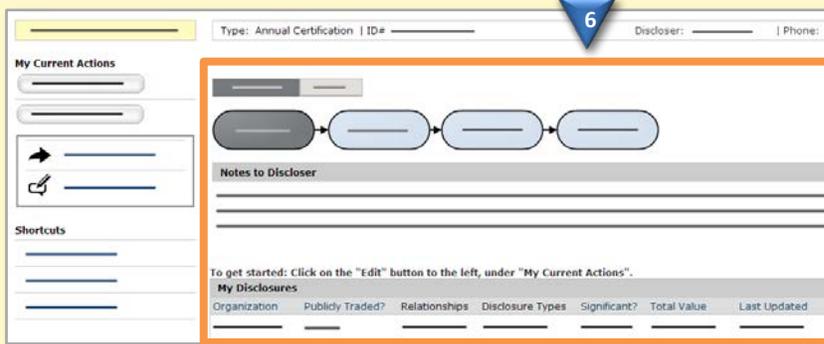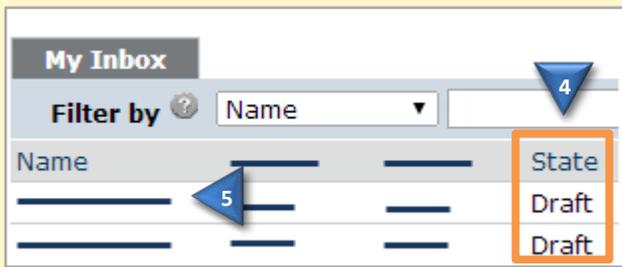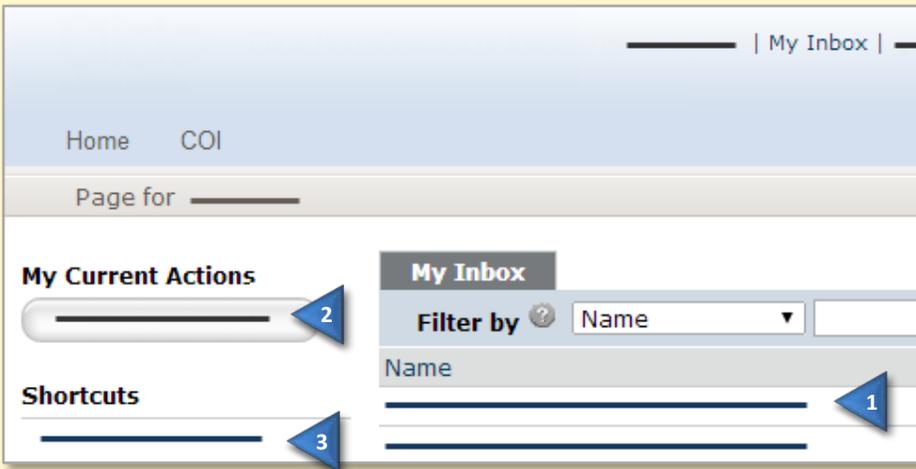
Where do I find?

From My Inbox, you can find:

1. **Certifications** that require you to take action on.

2. **Actions** you can perform such as create or update a certification.

3. **Shortcuts** that provide access 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.

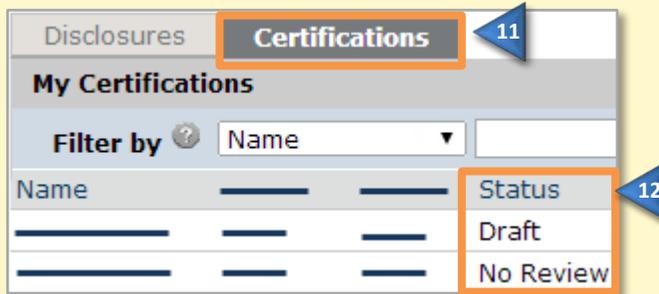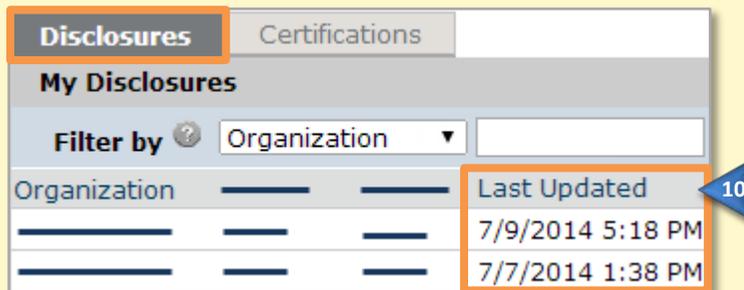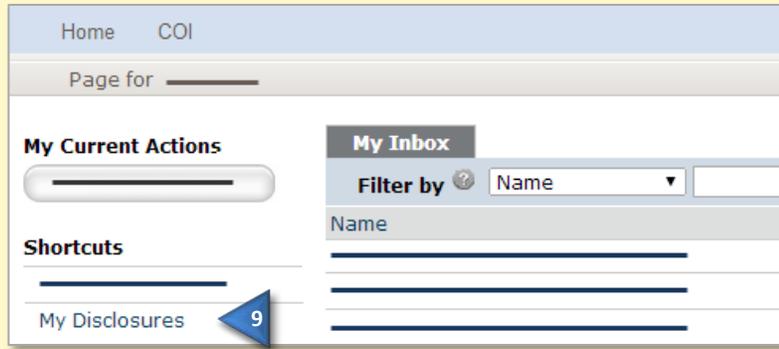See also View Certification History to see any reviewer comments.

Open a Certification

5. From the list of certifications, 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.

Home	COI

Page for ────

My Current Actions

────────

Shortcuts

────────

My Disclosures ◄ 9

My Inbox

Filter by ⊘ | Name ▾ |

Name

────────
────────
────────

Disclosures | Certifications

My Disclosures

Filter by ⊘ | Organization ▾ |

Organization	──	──	Last Updated ◄ 10
────────	──	──	7/9/2014 5:18 PM
────────	──	──	7/7/2014 1:38 PM

Disclosures | **Certifications** ◄ 11

My Certifications

Filter by ⊘ | Name ▾ |

Name	──	──	Status ◄ 12
────────	──	──	Draft
────────	──	──	No Review

Find Previous Certifications

9. On the left, 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.

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. If you no longer have the e-mail, from My Inbox, click **Edit My Certification** on the left.

3. Complete the pages. Click **Continue** to move to the next page.

   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**.

   a. The disclosure moves under Disclosures Under Review.

   b. Click **Edit**. Update the pages and then 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 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.

To: _____
Link: Annual Certification ◄ **1**

Type: _____

My Current Actions

Edit ◄ **2**

Filter by ⦿

_____   Type: Annual Certification | ID# _____

My Current Actions

→ Submit Changes ◄ **3**

In Review

Notes to Discloser

Submit Changes

Please provide any additional notes to the Office of Research Compliance reviewer:

4

Please attach any documents that clarify your changes for the reviewer:

Add

Name	Description
There are no items to display	

5 OK   Cancel

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** on the left and make the requested changes. 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 notes box, type your response to the reviewer.

5. Click **OK**. You can log off the system.
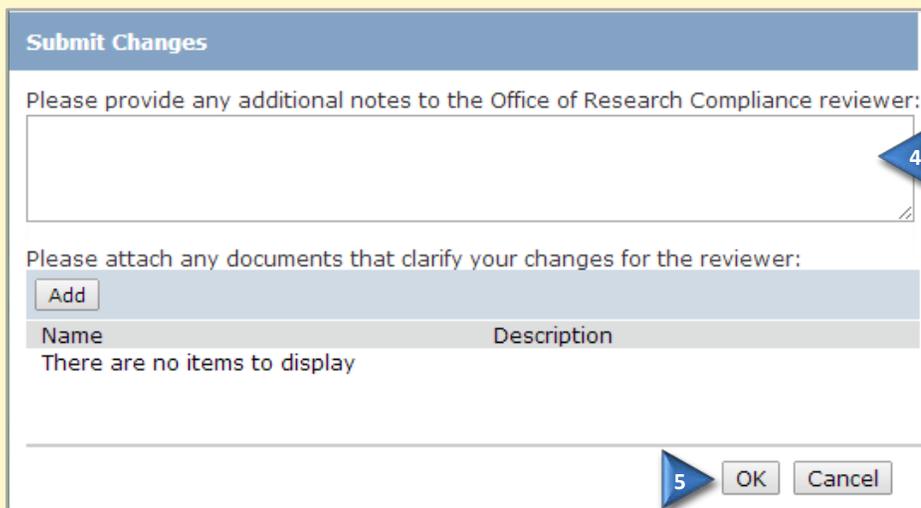
Respond to a Management Plan

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.

Update Your Certification

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

Update Your Certification

1. From My Inbox, click **Create My Certification**.

2. Type the reason for the update and then click **OK**.

3. In the certification workspace, click **Edit**.

4. Update the certification. **Tip:** Click the **Jump To** menu to go 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.