Help Videos:

Navigate the Discloser Profile Workspace

https://vimeopro.com/user43881429/huron-coi/video/551556198

Summary: Video provides walk through of how to navigate the disclosure profile workspace. A disclosure profile is a single form that an individual uses to answer all necessary question. Action Required means that discloser must perform some action and mentions the state of no action required. Covers the Instruction Center, the disclosure profile last completed, training last completed and training expiration areas. Covers the activities to complete the disclosure profile, request pre-approval button, edit disclosure profile button, the management plan section, disclosures tab, pre-approval requests tab, and the history tab.

Update Disclosures

· *Update Your Disclosure Profile – Nothing to Disclose*

o https://vimeopro.com/user43881429/huron-coi/video/551559146

Summary: Direction on what the discloser should do when they are asked to confirm their profile is up to date but there is nothing to disclose. It covers the instruction center area. Direction to Click the complete profile disclosure activity.

· *Update Your Disclosure Profile – No Changes*

o https://vimeopro.com/user43881429/huron-coi/video/551560518

Summary: Direction on what the discloser should do when they are asked to confirm their profile is up to date but there are no changes since the last update. Covers instruction center and reason for action required and no action required, disclosures tab and the view link for discloser to see a read only review of disclosure that was previously completed. Direction to Click the complete profile disclosure activity and provides discloser direction on how to update and add related context to help reviewer to make a determination.

· *Update Your Disclosure Profile – Changes*

o https://vimeopro.com/user43881429/huron-coi/video/551561485

Summary: Direction on what the discloser should do when there are changes, mentions being added to a research project or if the discloser's training is expired or if there is an annual update from the institution. Covers instruction center and reason for action required and no action required, disclosures tab for previous interests. Direction on clicking the Edit Disclosure Profile button, goes over how to complete the Disclosure Profile SmartForm and the instructions and policies area, the date that COI Training was completed area and direction to look out for the red asterisk on the required. It goes over a complete overview on how to make changes to the SmartForm. Direction to Click the complete profile disclosure activity and an alternative option of activities that can be taken if the profile is not complete and more information needs to be verified by discloser.

Submit a Pre-Approval Request

https://vimeopro.com/user43881429/huron-coi/video/672383209

Summary: How to submit a pre-approval request in the disclosure profile workspace. Direction to click the Request Pre-Approval activity and how to select the type of request and how to complete the Activity information SmartForm. Covers the Pre-submission state after submission of the pre-approval request, covers the activities that discloser can complete: submit, add comment, copy request (reason behind using this activity) or discard activity. Goes over the Pre-Approval requests tab and mentions email notifications that will be received when determination is made. Direction on how to enter the details that actually occurred as an interest in the disclosure profile after the pre-approval request activity has been completed. Direction to go through the Edit Disclosure Profile SmartForm and go to the entity disclosure information section and the approved request section. Overall, a summary of how to submit copy and mark complete for the Pre-Approval Request.

Review and Accept Management Plans

https://vimeopro.com/user43881429/huron-coi/video/551563488

Summary: How to review and accept a management plan. Covers the state of action required, the instruction center and reason. Covers The management plan section. Direction to Review and Accept Plans activity, covers the actions of discloser to update in the Review and Accept Plans window and how to open the management plan to review it and how to accept or not accept the plan.

Respond to a Clarification Request

https://vimeopro.com/user43881429/huron-coi/video/551562400

Summary: How to respond to a clarification, covers instruction center, action required and reason. Direction to submit response and goes over the pending clarification requests and how to update the response text to that clarification request and how to add documents if needed.