*My*Disclosures User Guide for Update Disclosure Certifications

This document provides step-by-step instructions for completing an Update Conflict Disclosure Certification in *My*Disclosures.

Do not submit an Update Disclosure Certification if you have not already completed an Annual Disclosure Certification for the current year.

If you need to complete a Disclosure Certification but have not yet completed an Annual Disclosure Certification, your supervisor should submit this form. You will automatically receive an email from MyDisclosures with a link to your Annual Disclosure Certification when it is created for you.

Need Assistance?

For help guides and information about disclosure, please visit the Pitt COI Website.
If you need further assistance, please contact mydisclosures_support@pitt.edu

Login

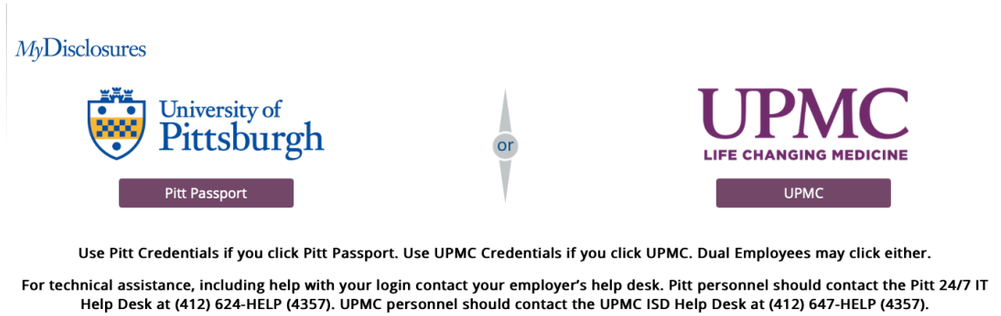
Go to www.mydisclosures.pitt.edu.

Click on either Pitt Passport or UPMC to access *My*Disclosures. Choose the institution you are employed by to log in. If you are dually employed, you may use either.

If you have trouble with your login:

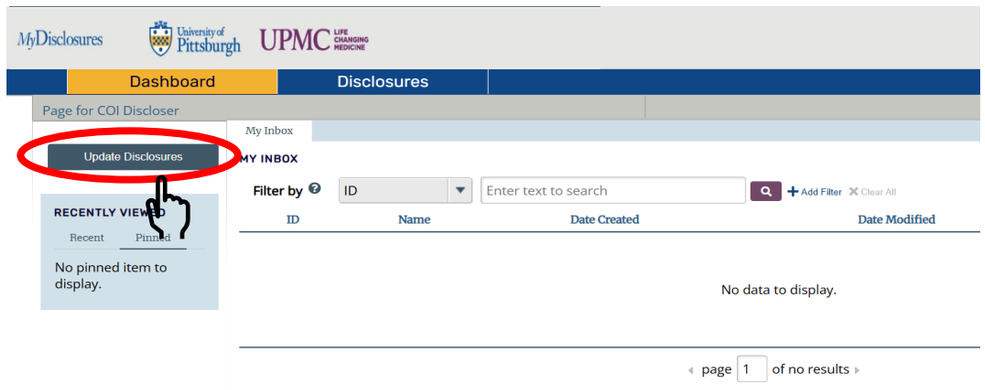
Pitt employees: contact the Pitt 24/7 IT Help Desk at (412) 624-HELP (4357).

UPMC Employees: contact the UPMC Help Desk at (412) 647-HELP (4357).



Update Conflict Disclosure Certification

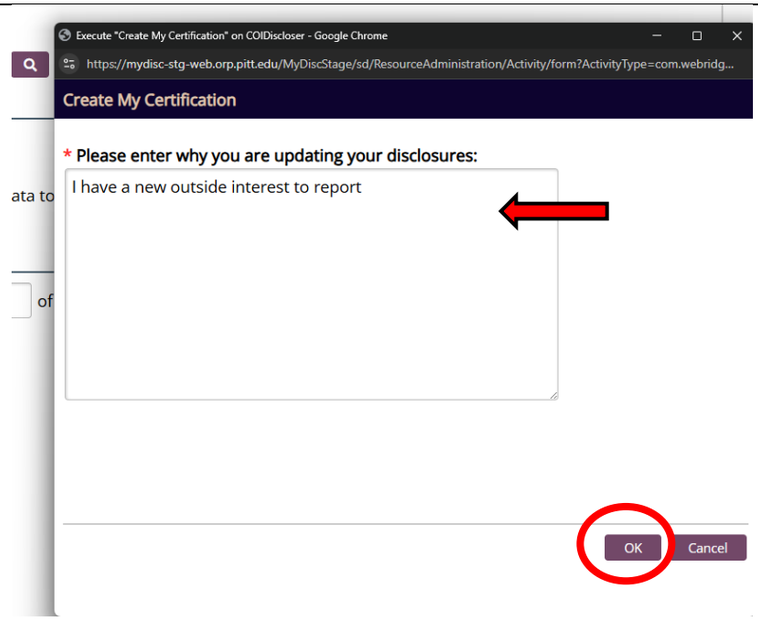
To start a new Update Disclosure Certification, click the **Update Disclosures** button.



When you click *Update Disclosures*, a new window will open.

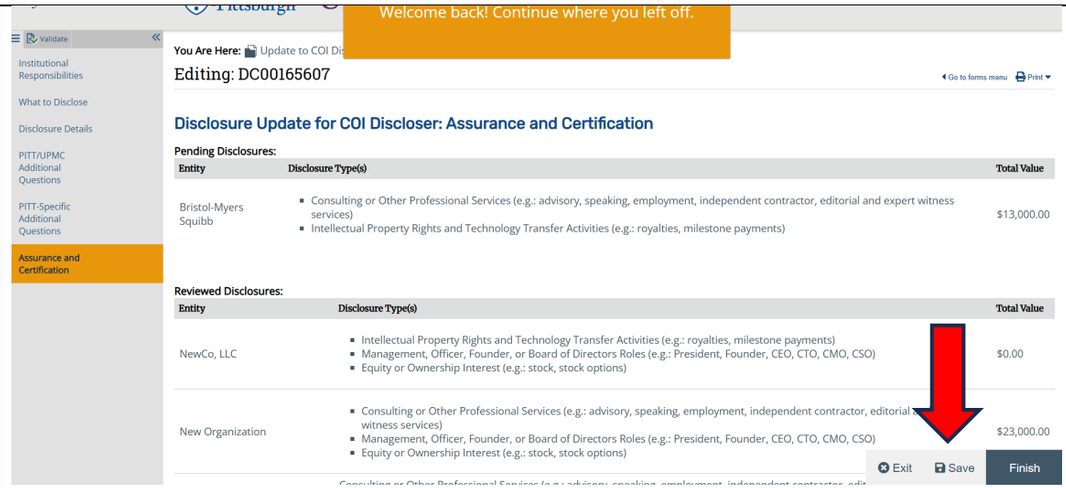
Provide a brief statement about what you need to update on your Disclosure Certification.

Click **OK** to continue.

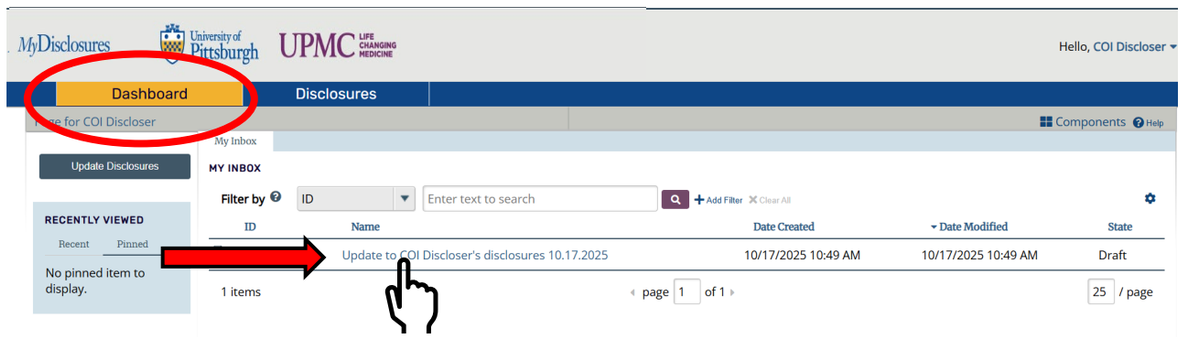


Save and Return Later

While you are completing your Disclosure Certification, if you want to save your work and return to your disclosures later, click **Save,** then click **Exit** at the bottom of any page**.**



When you login to *My*Disclosures again to continue working on your Disclosure Certification, your Update Disclosure Certification will be available for you in your **Dashboard** tab. Click on your Disclosure Certification to open it.



Edit your Disclosure Certification

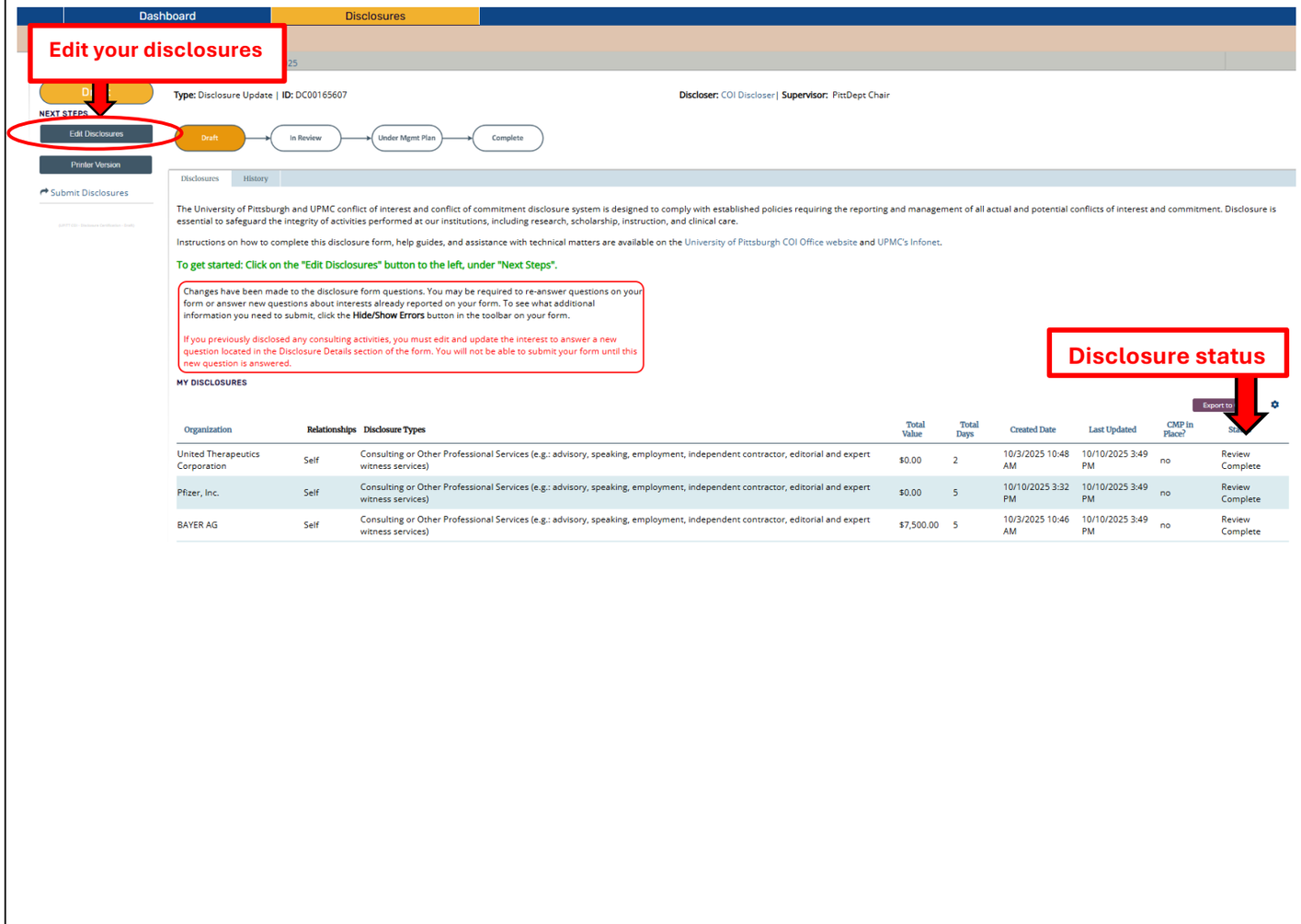
When you open your Disclosure Certification, you will land on the main Disclosure Certification page. This page shows a summary of all disclosures that are currently reported on your Disclosure Certification.

Disclosure Status

Each disclosure on the summary page will have a status:

- "*Under Modification*" means the disclosure was added or updated and is awaiting review by the supervisor(s). The disclosure will remain in this status until the primary supervisor approves the Disclosure Certification, at which time it will change to "Review Complete".
- "*Pending Removal*" means you are deleting the disclosure from your Disclosure Certification. It will remain in this status until the primary supervisor submits their approval. After the primary supervisor approves, the disclosure will be removed from your Disclosure Certification.
- "*Review Complete*" means the disclosure has been reviewed and approved by the supervisor(s).

To get started, click **Edit Disclosures** on the top left side of the screen.



Institutional Responsibilities

On this page, you will identify your institutional affiliations with Pitt and UPMC, your supervisor(s), and indicate whether you receive funding from a federal agency for your research.

Institutional Affiliations

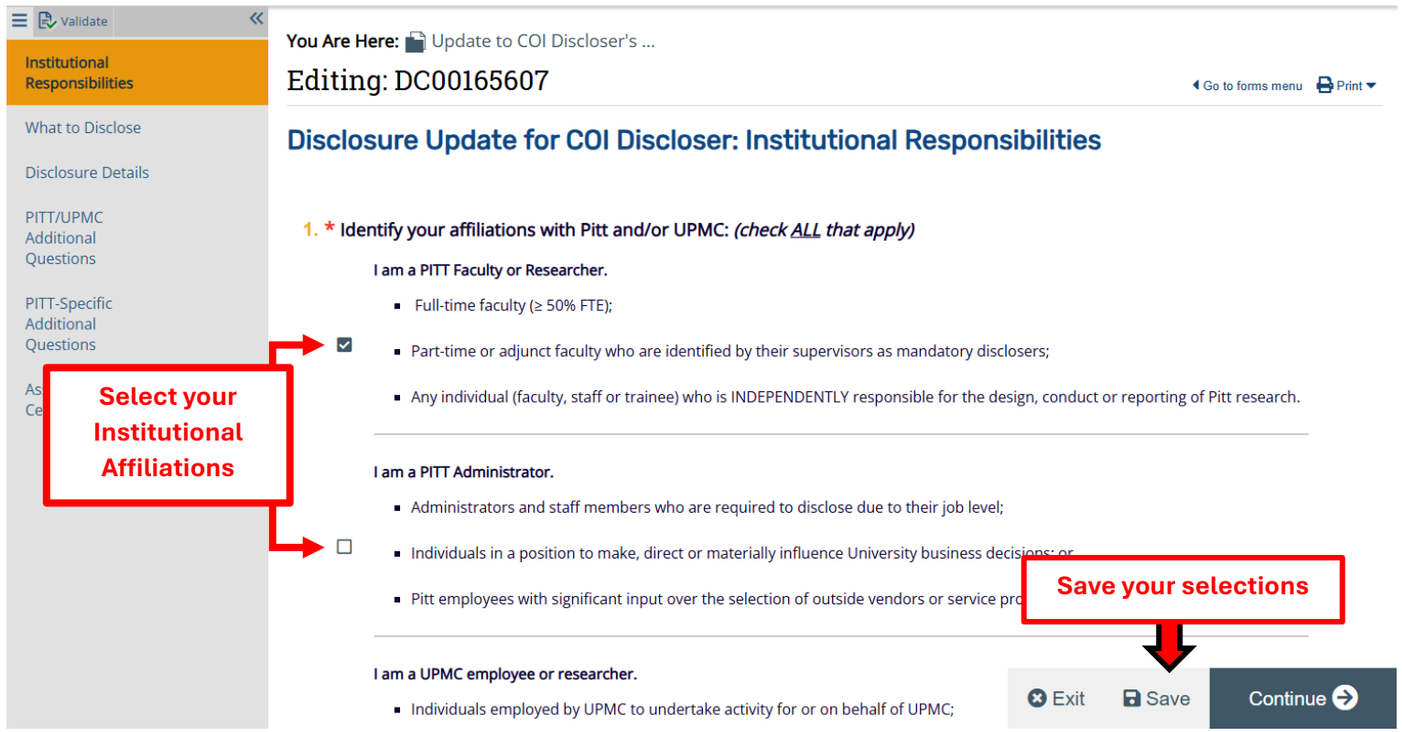
Select all affiliations that apply to you.

To add an institutional affiliation, click the box next to the affiliation you want to add. A checkmark will appear when the affiliation has been selected.

To remove an affiliation, click the box next to the affiliation you want to remove.

Save your Institutional Affiliation selections

After selecting your affiliations, click Save **at the bottom of the screen, then scroll down to the next question.**



Primary and Secondary Supervisors

The supervisor review in *My*Disclosures is the Pitt supervisor review. **All Pitt disclosers must list supervisors that have a Pitt appointment or affiliation. Do not list a UPMC-only employee as your supervisor.**

Primary Supervisor

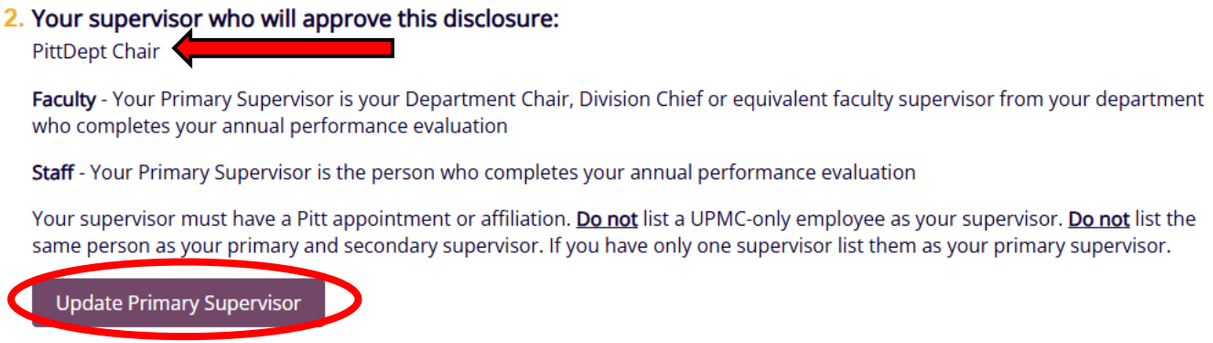
Verify that the person listed as your primary supervisor is correct.

Pitt Faculty: Your primary supervisor is your department chair, division chief, or equivalent faculty supervisor that completes your annual Pitt performance evaluation.

Pitt Staff: Your primary supervisor is the person who completes your annual Pitt performance evaluation.

If you are unsure about who you should list as your primary supervisor, contact your department chair or administrator for direction.

If the incorrect person is listed, if a UPMC-only employee is listed, or if no primary supervisor is listed on your Certification, click on **Update Primary Supervisor**.



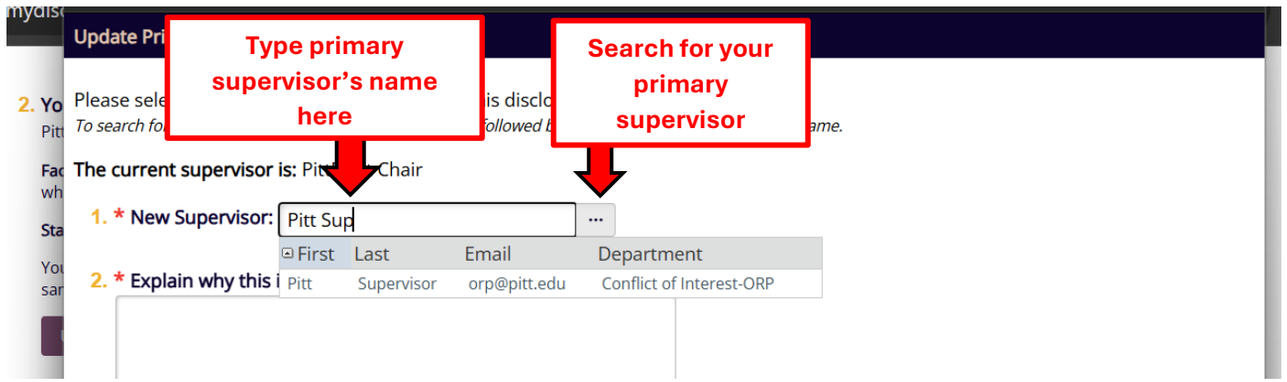
Update your Primary Supervisor

Select your Primary Supervisor

When you click *Update Primary Supervisor*, a new window will open. Type your primary supervisor's first or last name into the text box. Click on your supervisor's name to select it.

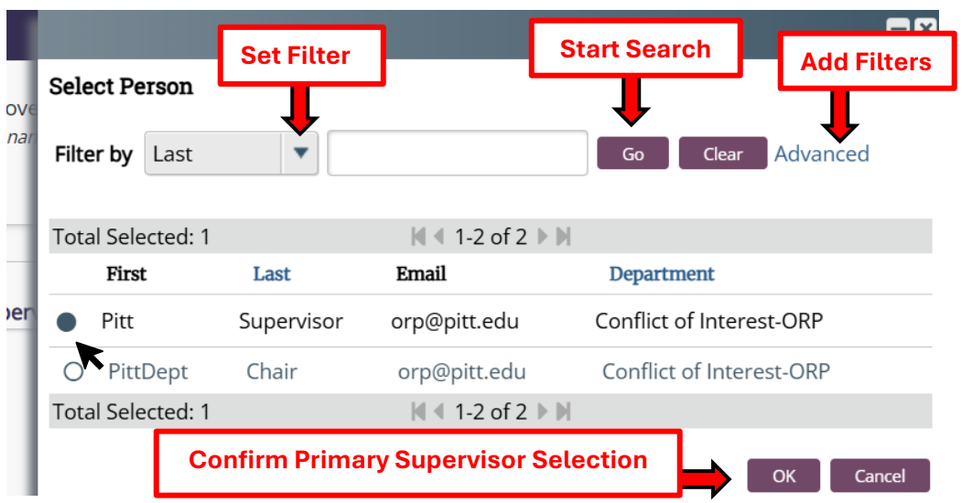
Search for your Primary Supervisor

If your primary supervisor's name does not immediately appear, search for their name by clicking on the ··· icon next to the text box.



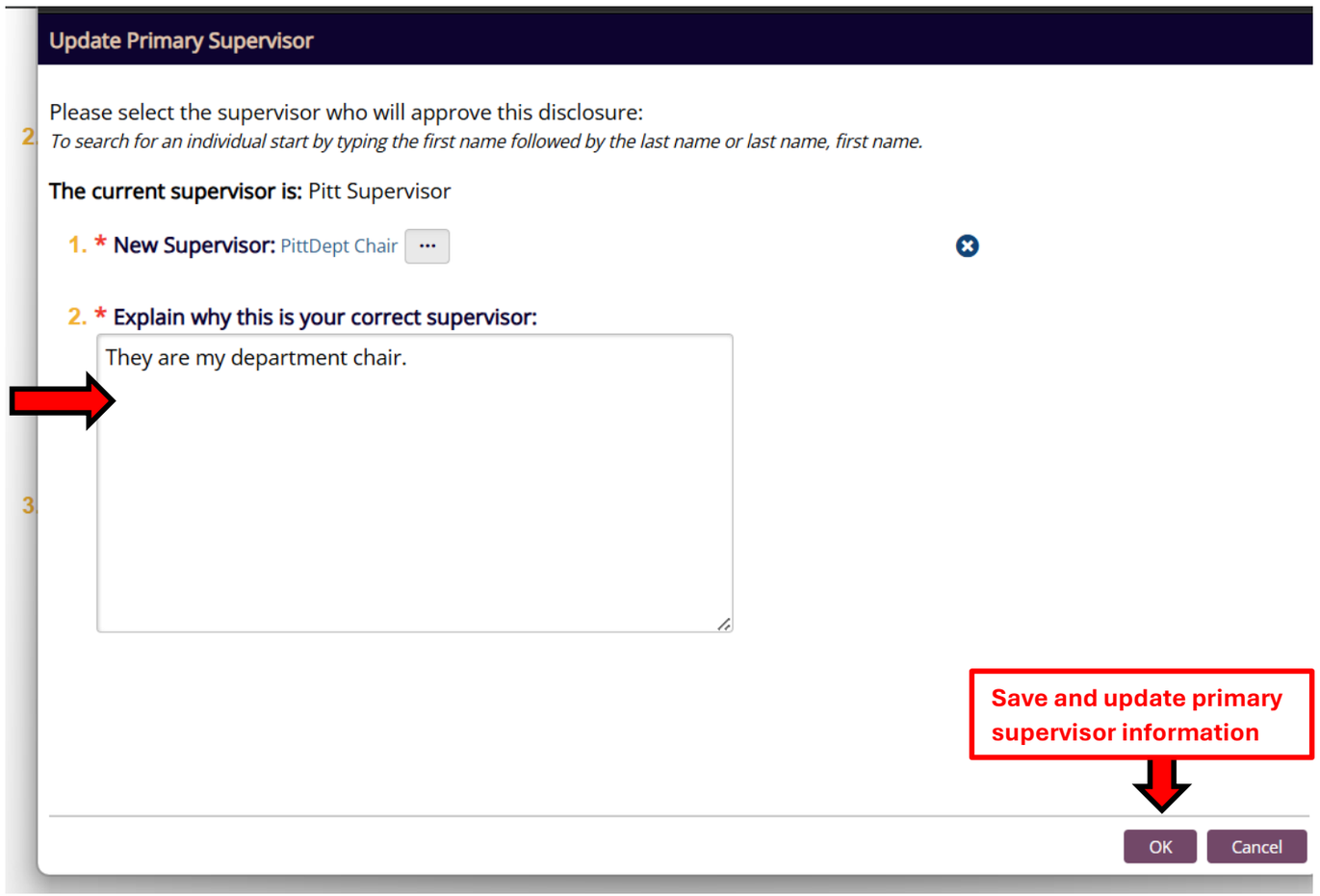
In the new window, set the filter to "Last" to search for your supervisor by last name. To add additional filters, including first name, email and department, click the Advanced button. Click "Go" to start your search.

Select your supervisor by clicking the button next to their name. Then click **OK**.



After selecting the correct primary supervisor, briefly explain why this person is your correct supervisor in the text box.

Click **OK** at the bottom right to save and update your primary supervisor information.



Secondary Supervisor

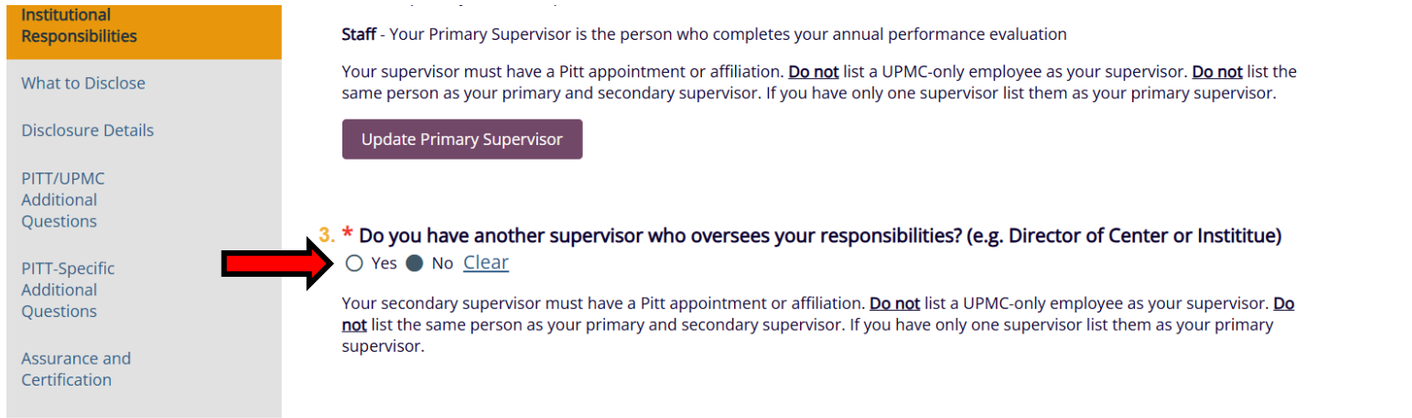
If you have more than one Pitt supervisor that should review your Disclosure Certification, list them as your secondary supervisor. For example, if you belong to one of Pitt's centers or institutes (e.g.: McGowan Institute, Hillman Cancer Center), you may be required to list your department chair as your primary supervisor and the center director as your secondary supervisor.

Most disclosers do not have a secondary supervisor.

If you and your primary supervisor have a relationship with the same outside entity, you should name another appropriate supervisor who does not have an interest in that entity as your secondary supervisor.

All secondary supervisors **must** have a Pitt appointment or affiliation. **Do not** list a UPMC-only employee as your secondary supervisor.

Do not list the same person as your primary and secondary supervisors. If you only have one supervisor, list them as your primary supervisor. If you are unsure whether you have a secondar supervisor, contact your primary supervisor, department chair or administrator for direction.



Add a Secondary Supervisor

To add a secondary supervisor, click **Yes** next to question 3. A new text box will appear.

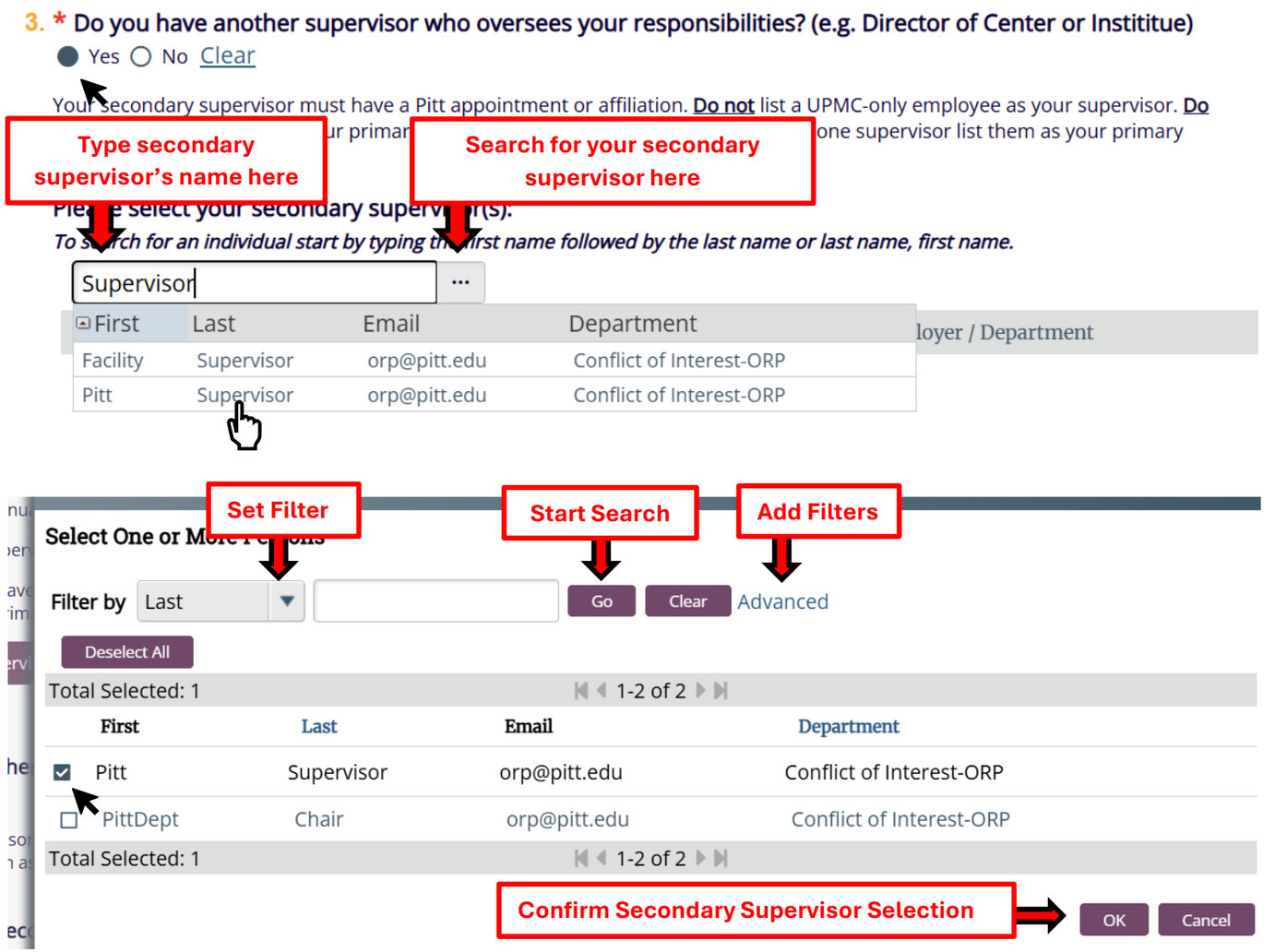
Type your secondary supervisor's first or last name into the text box. Click on your secondary supervisor's name to select it.

Search for your Secondary Supervisor

If your secondary supervisor's name does not immediately appear in the list, you can search for their name by clicking on the ··· icon next to the text box.

In the new window, set the filter to "Last" to search for your supervisor by last name. To add additional filters, including first name, email and department, click the Advanced button. Click "Go" to start your search.

Select your supervisor by clicking the button next to their name. Then click **OK** to confirm your secondary supervisor selection.



Change your Secondary Supervisor

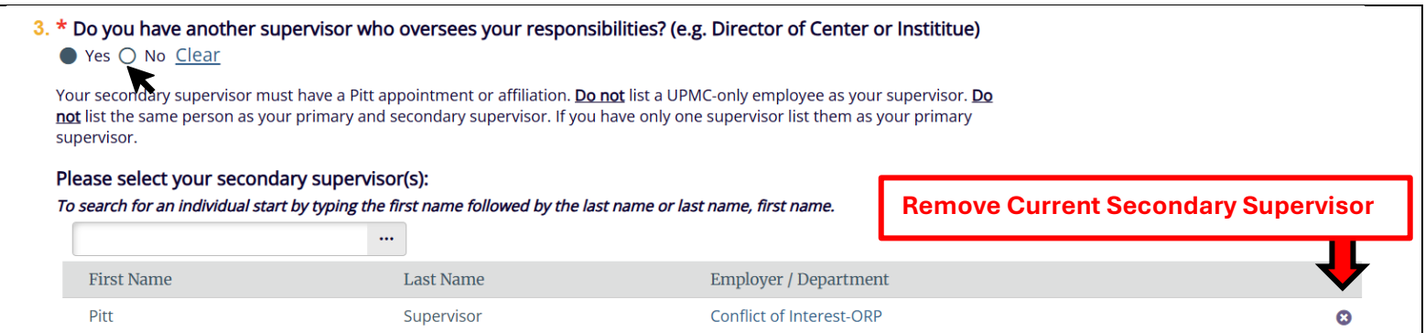
To change your secondary supervisor, first remove your current secondary supervisor by clicking the **X** to the right of their name. After removing your former secondary supervisor, add your new secondary supervisor by following the steps above.

Remove your Secondary Supervisor

To remove your current secondary supervisor, first click **X** to the right of their name. Then, change your answer to question 3 to "No".

Save your Secondary Supervisor Information

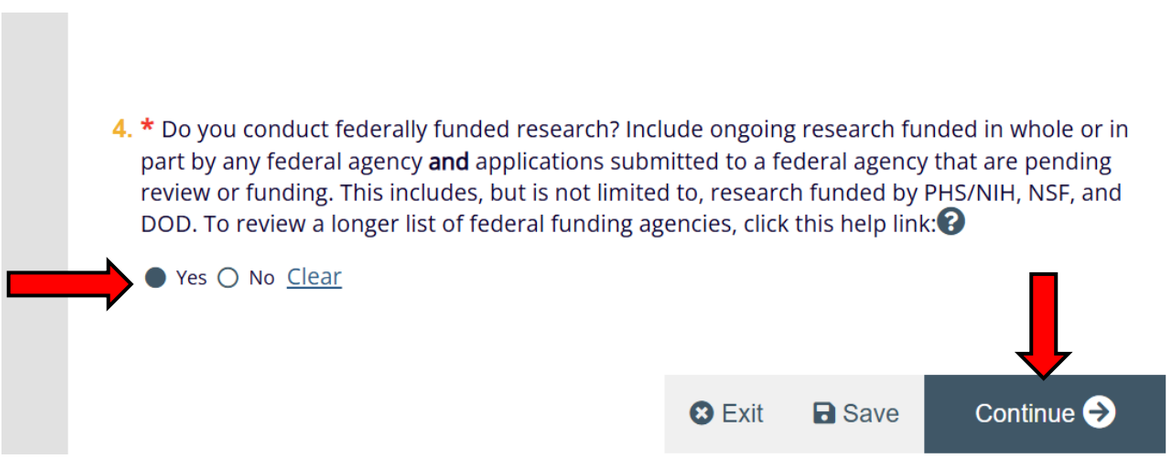
After updating your information, click **Save** at the bottom of the screen, then scroll down to the next question.



Federal Research Funding

Indicate whether you conduct federally funded research.

Click **Continue** at the bottom of the page to proceed.



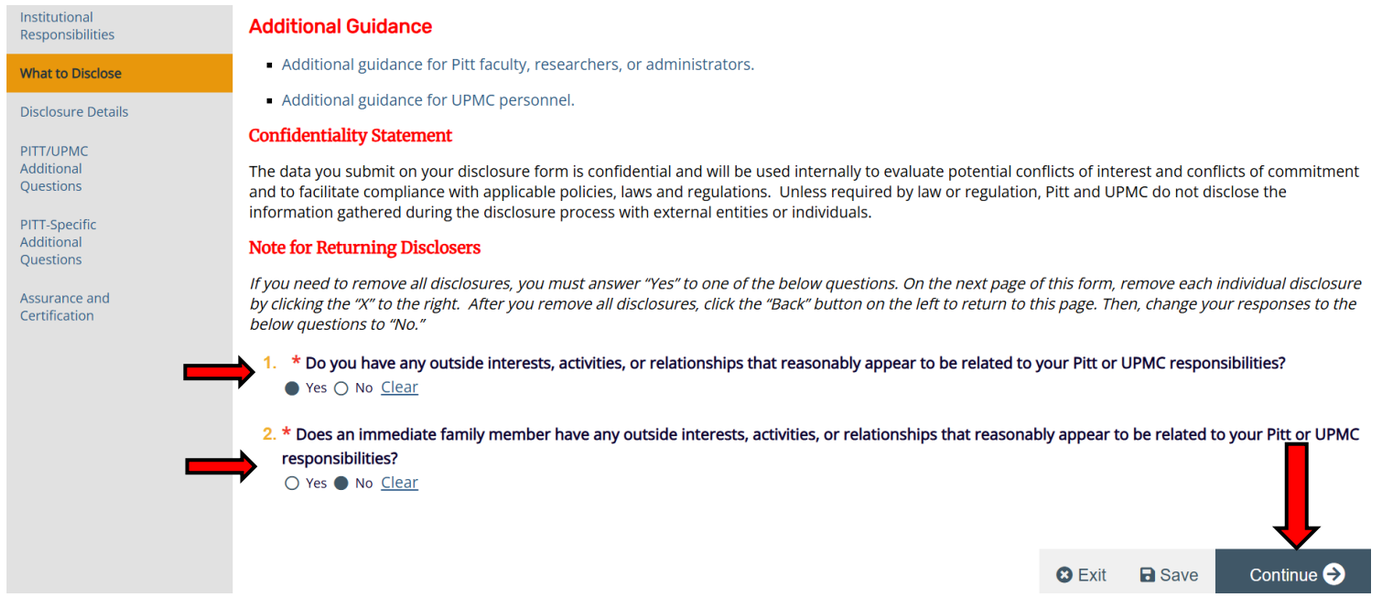
What to Disclose

This page summarizes what you need to disclose. Please review it carefully. For additional guidance about what to disclose, visit the What do I have to Disclose page of the Pitt COI Division website.

Answer both questions at the bottom of the page to indicate whether you have anything to report.

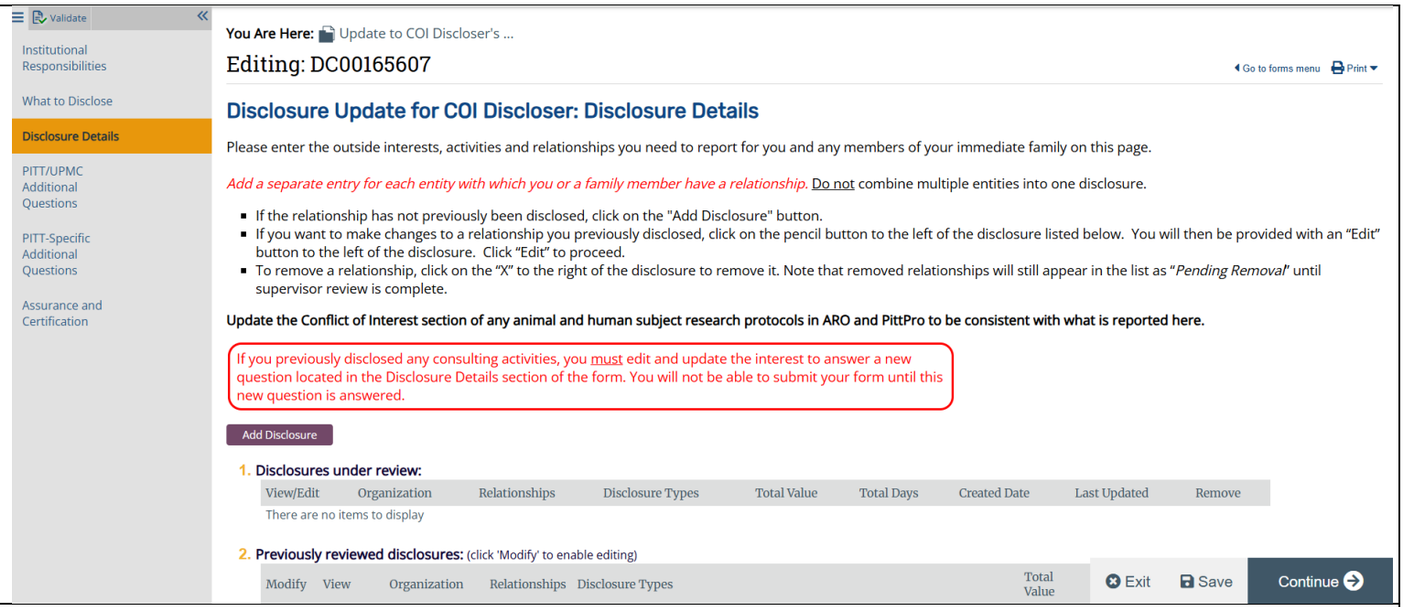
If you are removing all of your disclosures, you must keep "Yes" selected on this page and click "Continue". You will be taken to the Disclosure Details page where you will remove each Disclosure *(see instructions below for Removing Disclosures)*. After you remove each disclosure, use the menu on the left to return to the *What to Disclose* page and change your answer(s) on this page to "No".

Click **Continue** at the bottom of the page to proceed.



Disclosure Details

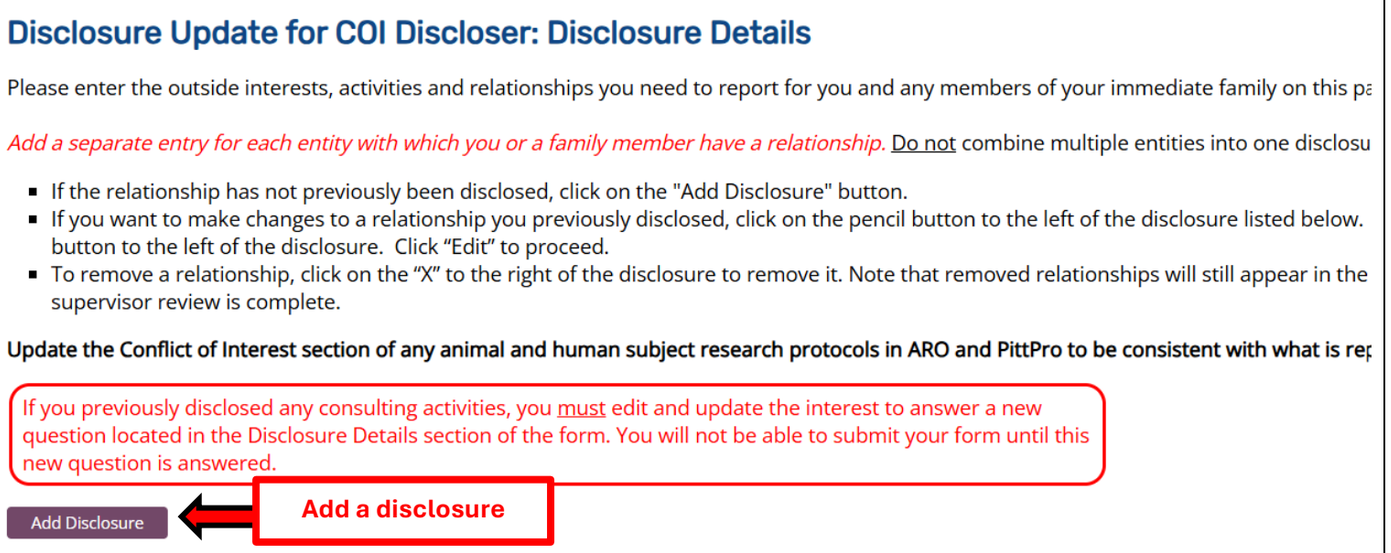
The *Disclosure Details* section is where you will add, revise or remove your disclosures.



Add a New Disclosure

Add a separate disclosure for each outside entity with which you have a relationship. Do not combine multiple outside entities into one disclosure.

Click **Add Disclosure** to create a new disclosure.



Identify the Outside Organization

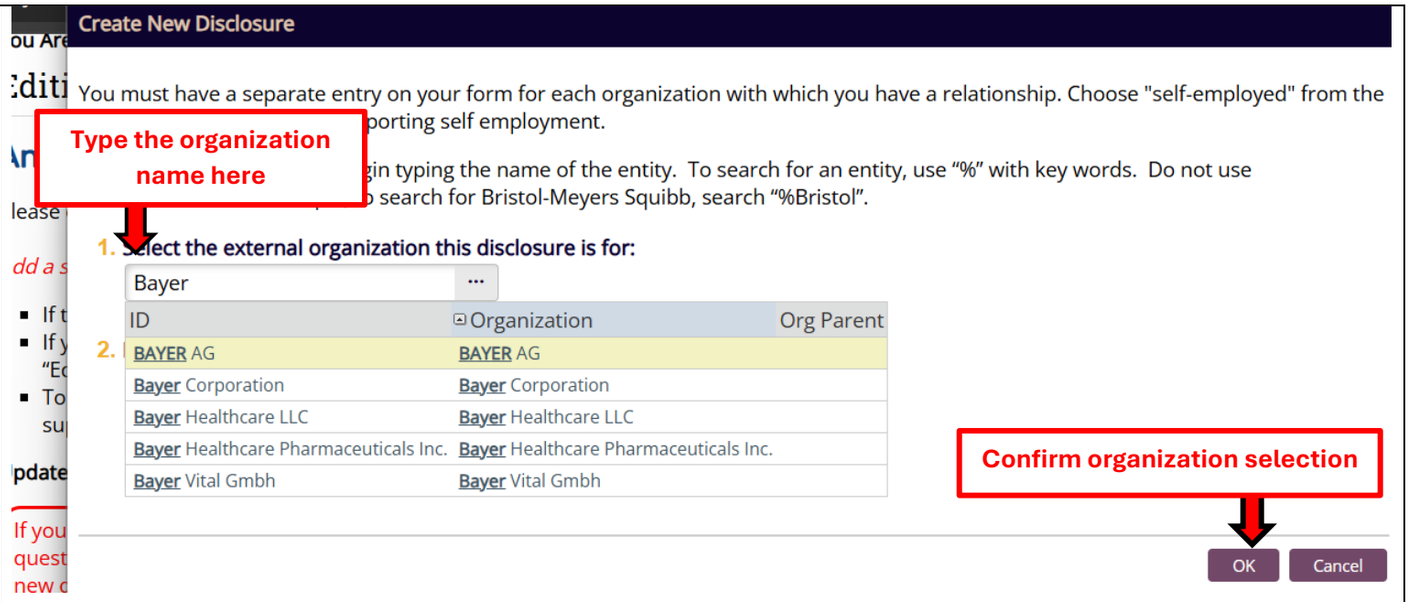
After you click *Add Disclosure,* a new window will open.

Type the full name of the outside organization, company or other entity with which you or your family member has a relationship into the search bar. *Do not use abbreviations*. Click on an organization to select it from the list.

Search for an Organization

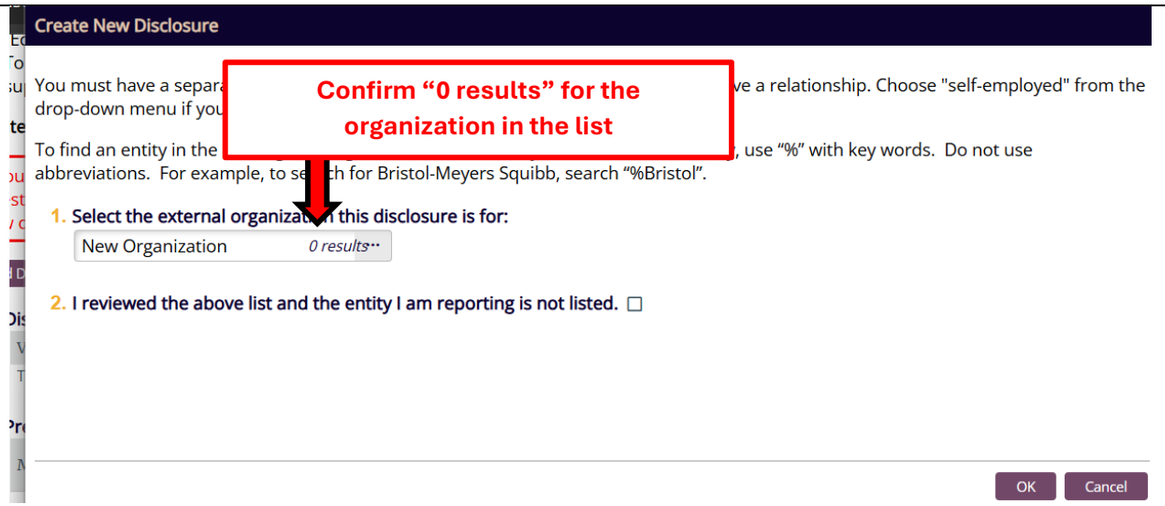
If the name of the organization does not appear in the list, search for it by typing "%" with key words. For example, to find Bristol-Meyers Squibb, type "%Bristol%" or, to find the Department of Energy, type "%Energy%".

Select the organization from the drop-down list and click **OK** to confirm your selection**.**



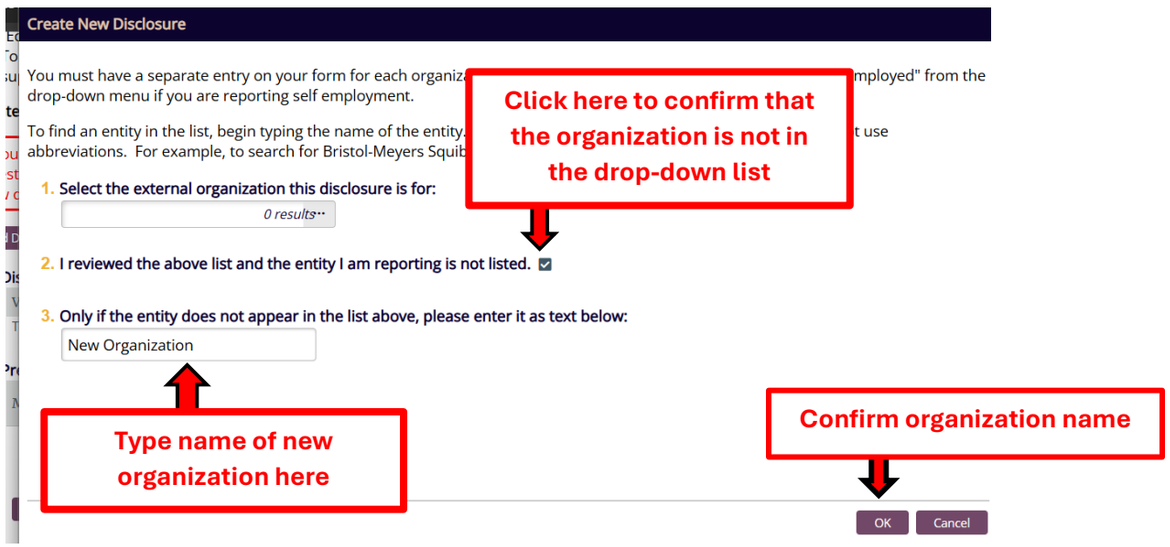
Enter an unlisted Organization

If the organization does not appear in the drop-down list, you can enter it by name. First, you must confirm that the organization does not appear in the list.



***Only if* the name of the organization does not appear in the drop-down list when you search**, check the box at question 2. A text box will appear. Type the entity name into the box. **Do not** include any information other than a single entity name in the text box.

Click **OK** to confirm the name of the organization. Later, you will be prompted to add additional information about the entity.



Disclosure General Information

Question 1 will display the name of the organization you selected. **Answer questions 2 through 7 on this page.**

Under question 7 about relationship types, select ***all types*** of relationships that you have with the entity.

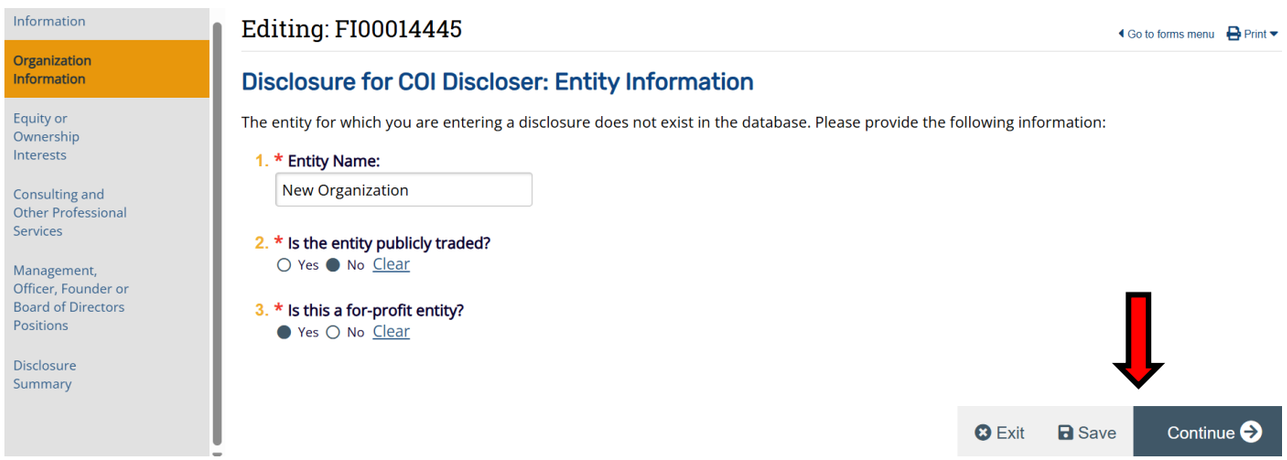
Click **Continue** at the bottom right to save your answers and advance to the next page.



Organization Information

You will see the Organization Information page ***only if*** you entered an unlisted organization above. Answer each question that appears for you.

Click **Continue** at the bottom right to save your answers and advance to the next page.

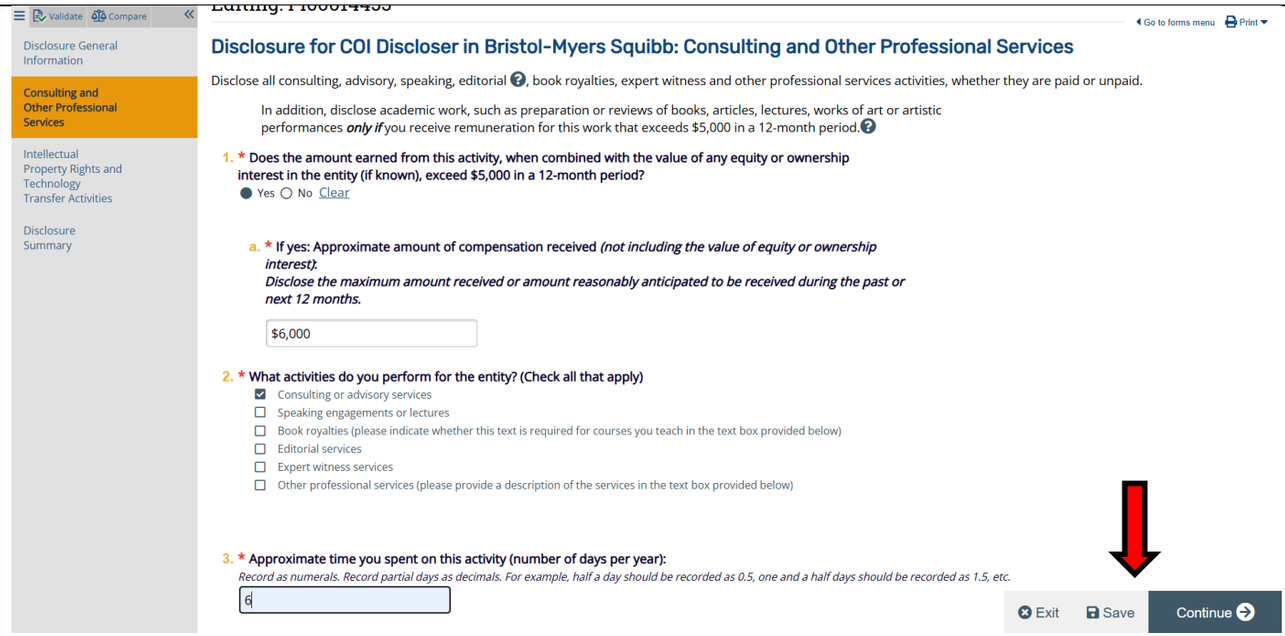


Disclosing Information

You will have a separate page for each type of relationship you report having with the entity. You will be asked questions about each type of relationship.

Click **Continue** at the bottom of the screen to save your answers and advance to the next page.

To save your work and come back later, click **Save** then **Exit** to return to the *Disclosure Details* page.



Disclosure Summary

After entering details about each type of relationship you have with an organization, you will be shown a **Disclosure Summary**.

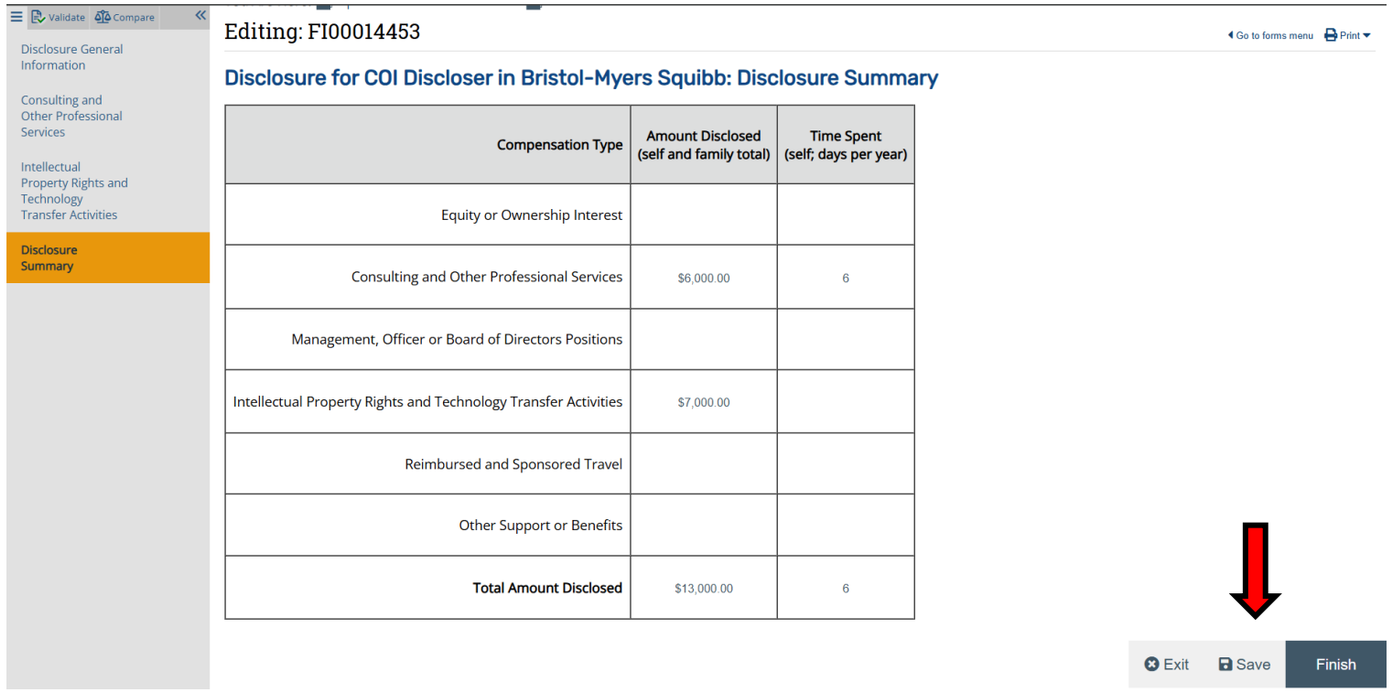
Confirm the information you entered is accurate.

If you need to change any information, use the menu on the left side of the page to navigate to the page you want to revise. Click **Save** at the bottom of the page before navigating to another page.

Click **Finish** at the bottom of the page to finalize your new disclosure.

After you finalize a Disclosure, you will be routed back to the **Disclosure Details** page where you can see all disclosures you entered and add or edit additional disclosure.

If you are returning to edit a disclosure at a later date, you may be routed back to the main Disclosure Certification page after you submit the revised disclosure. Click **Edit Disclosures** at the top right to return to the **Disclosure Details** page.



Review, Edit or Remove Disclosures

Disclosures under review

These are the disclosures you are editing or adding. To make additional changes, click **Edit**.

Previously reviewed disclosures

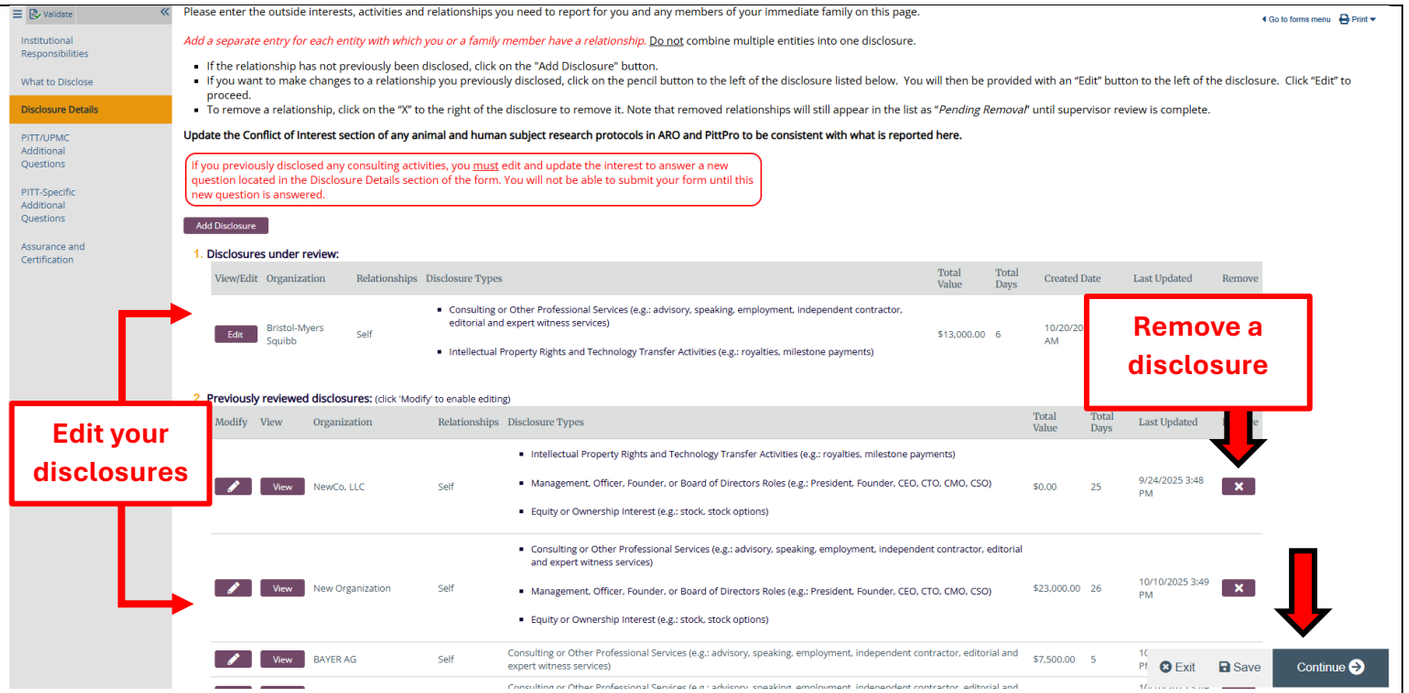
These are disclosures you previously added and that your supervisor has reviewed. Review the disclosures you previously reported and confirm that the information is up-to-date, including the amount you earned and time you spent on the activity.

To edit a disclosure you previously entered, click the  icon to open it and make changes.

To remove a disclosure, click the  icon to the right of the entry you want to remove.

Note: When you remove a disclosure, it will still appear on your Disclosure Certification with a status of "Pending Removal" until your supervisor submits their approval. When your supervisor approves, the disclosure will be removed from your Disclosure Certification.

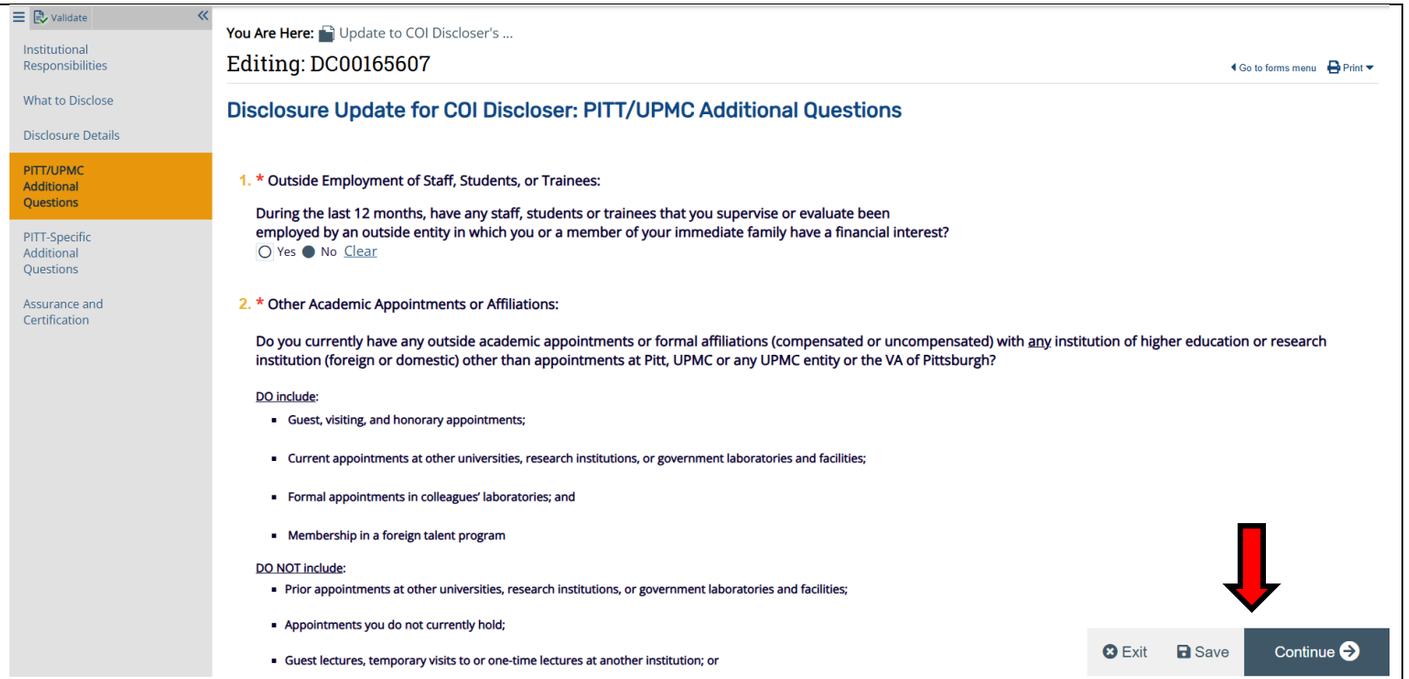
If you are removing all disclosures from your Certification, remove each disclosure, then use the menu on the left to return to the ***What to Disclose*** page. On that page, change your responses to the questions to "*No*". Then, click **Continue** at the bottom of the screen to proceed.



Additional Questions

You will be prompted to answer additional questions based on your institutional responsibilities at Pitt and UPMC.

Click **Continue** at the bottom of the page to save your answers and advance to the next page. To save your work and return later, click **Save** then click **Exit**.



Submit Your Certification

Review the summary of your disclosures and the Assurance and Certification statement.

If you need to make changes, use the menu on the left side of the page to navigate to the section you want to revise.

To save and return to your disclosures later, at the bottom of the page, click **Save,** then click **Exit** at the bottom of the page.

When you are ready to submit your disclosures, select "**Yes"** at the bottom of the page. Then click **Finish** at the bottom of the page

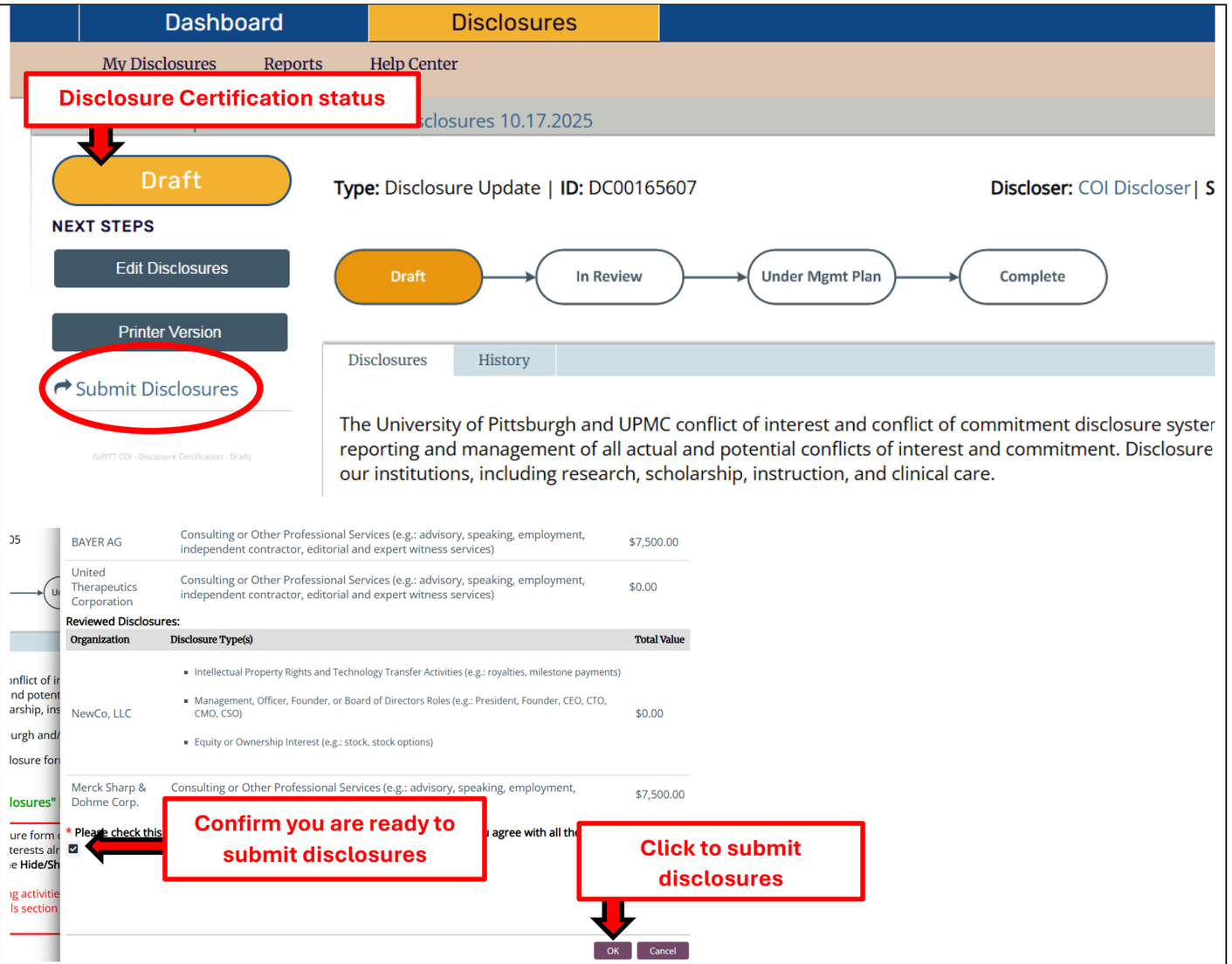
When you click "Finish", the status of your Disclosure Certification should change to either "Department Review" or "No Interests Disclosed". This status indicates that your Disclosure Certification has been submitted and is pending review by your supervisor.



If you click *Finish* and your Disclosure Certification is still in "Draft" status, click **Submit Disclosures** on the left side of the screen. A new window will open.

In the new window, review the information at the top of the page and confirm your disclosures are accurate.

Check the box at the bottom of the screen to confirm you are ready to submit your disclosures. Then, click **OK** at the bottom of the page.



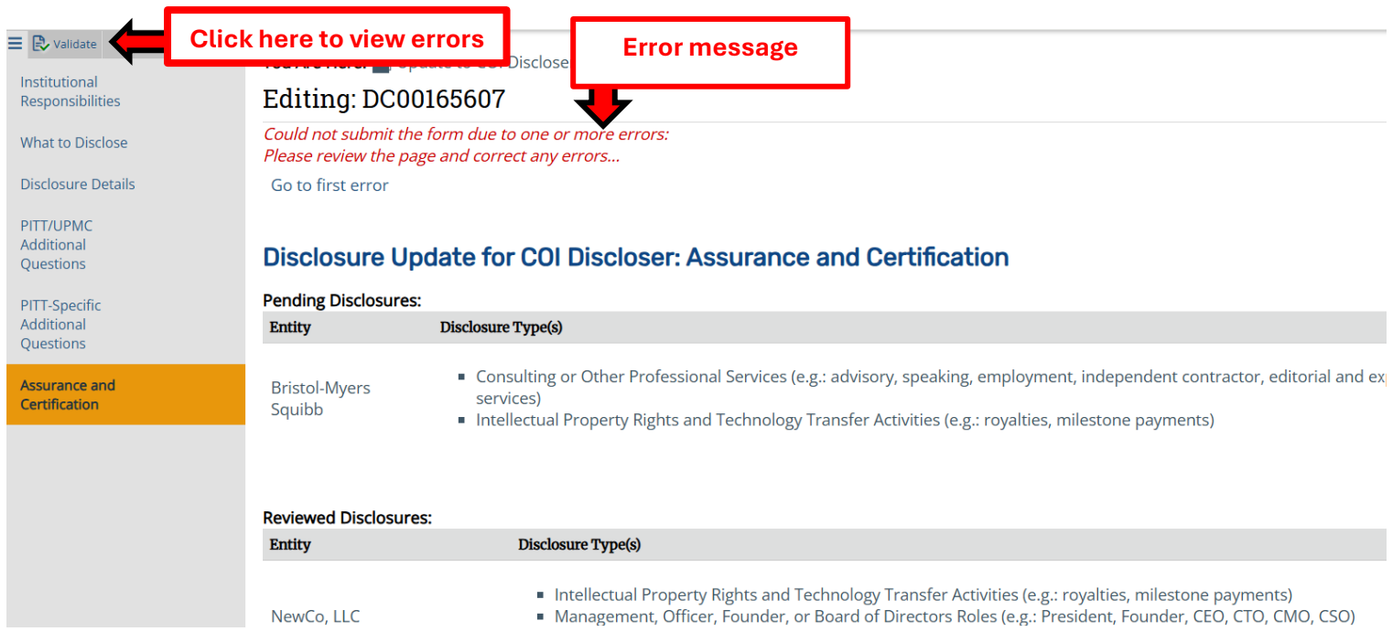
Error Messages

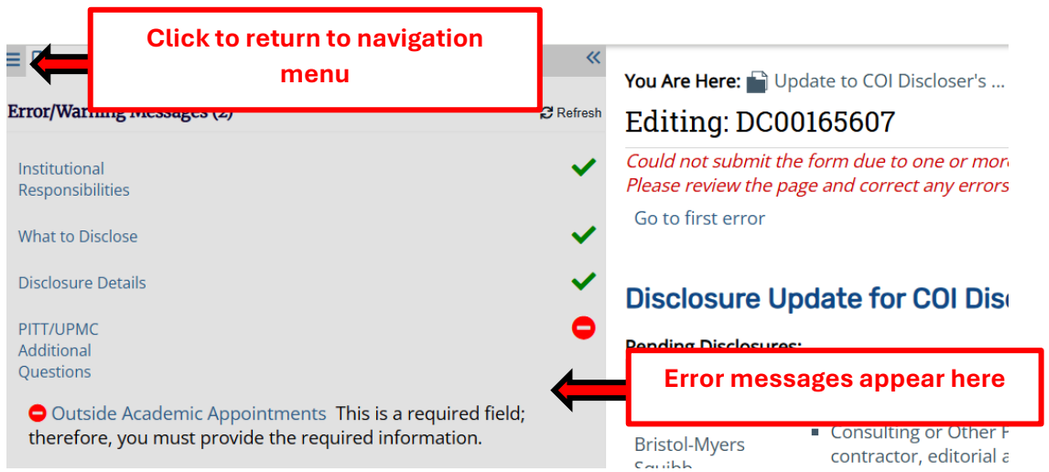
If you missed any required information on your Disclosure Certification, you will see an error message when you try to submit it.

To identify the pages you need to revise, click **Validate** at the top left of the page.

A list of errors on your Disclosure Certification will appear in a new panel on the left. Note the pages you need to correct.

Then, click the ☰ button in the top left corner to return to the navigation menu. Use the menu to navigate to the pages you need to revise.

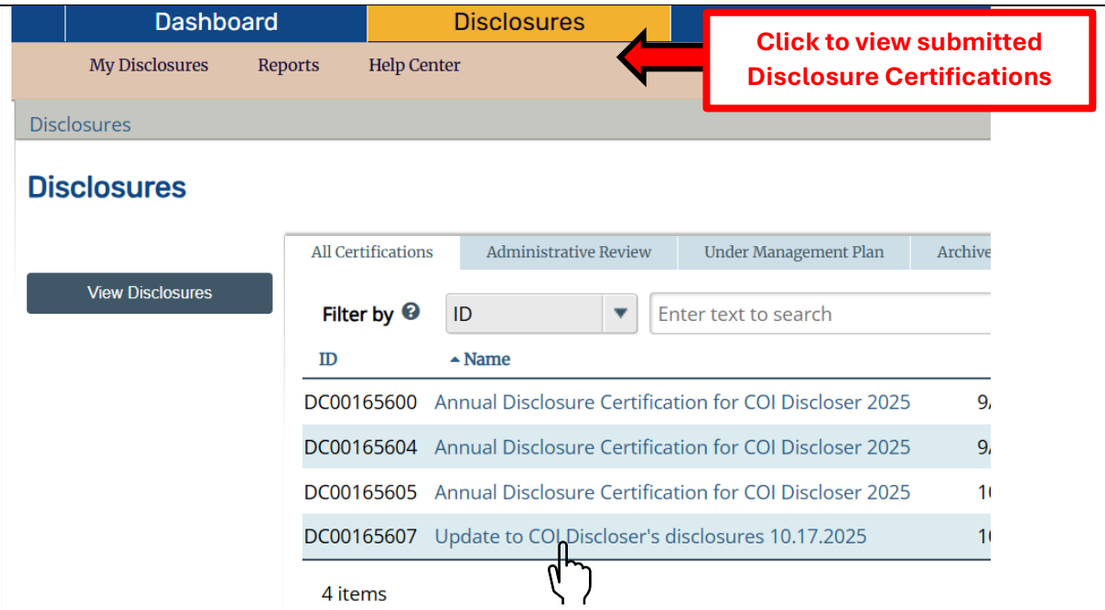




After Submitting your Disclosure Certification

View your submitted Disclosure Certification

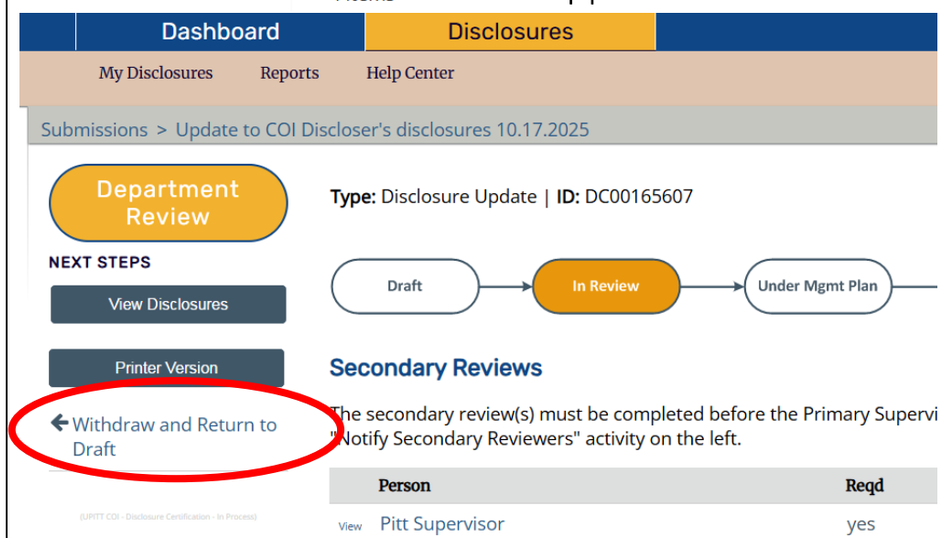
You can view your Disclosure Certification at any time by logging in to www.mydisclosures.pitt.edu and clicking the **Disclosures** tab at the top of the page. Click on your Certification from the list to open it.



Making changes before Supervisor Review

If you need to revise your disclosures before your supervisor reviews, go to the **Disclosures** tab and click on your Disclosure Certification to open it as shown above.

When your Disclosure Certification is open, click **Withdraw and Return to Draft** on the left side of the page. A new window will open. Click **OK t**o withdraw your submitted Disclosure Certification from your supervisor's review queue and make changes**.** Edit your information as needed and be sure to re-submit your Disclosure Certification.



Supervisor Review

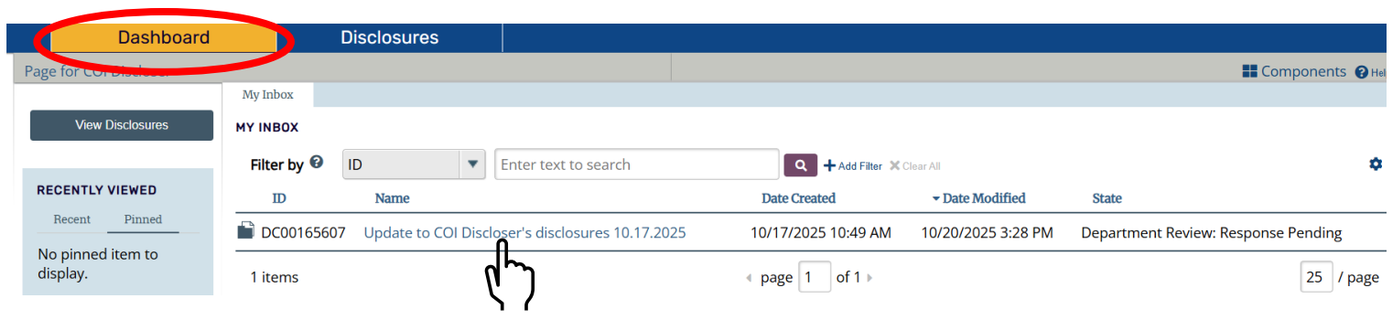
You will receive an email notification from *My*Disclosures when your supervisor submits their review of your Disclosure Certification. Your supervisor may:

- Approve
- Approve with Comment
- Request that you make changes to your Disclosure Certification before they approve

Make Supervisor-Requested Changes to your Disclosure Certification

Department Review: Response Pending

If your supervisor requests that you make changes to your Disclosure Certification before they approve it, your Disclosure Certification will be sent back to your **Dashboard**. The state will be listed as *Department Review: Response Pending*. Click on your Disclosure Certification to open it.

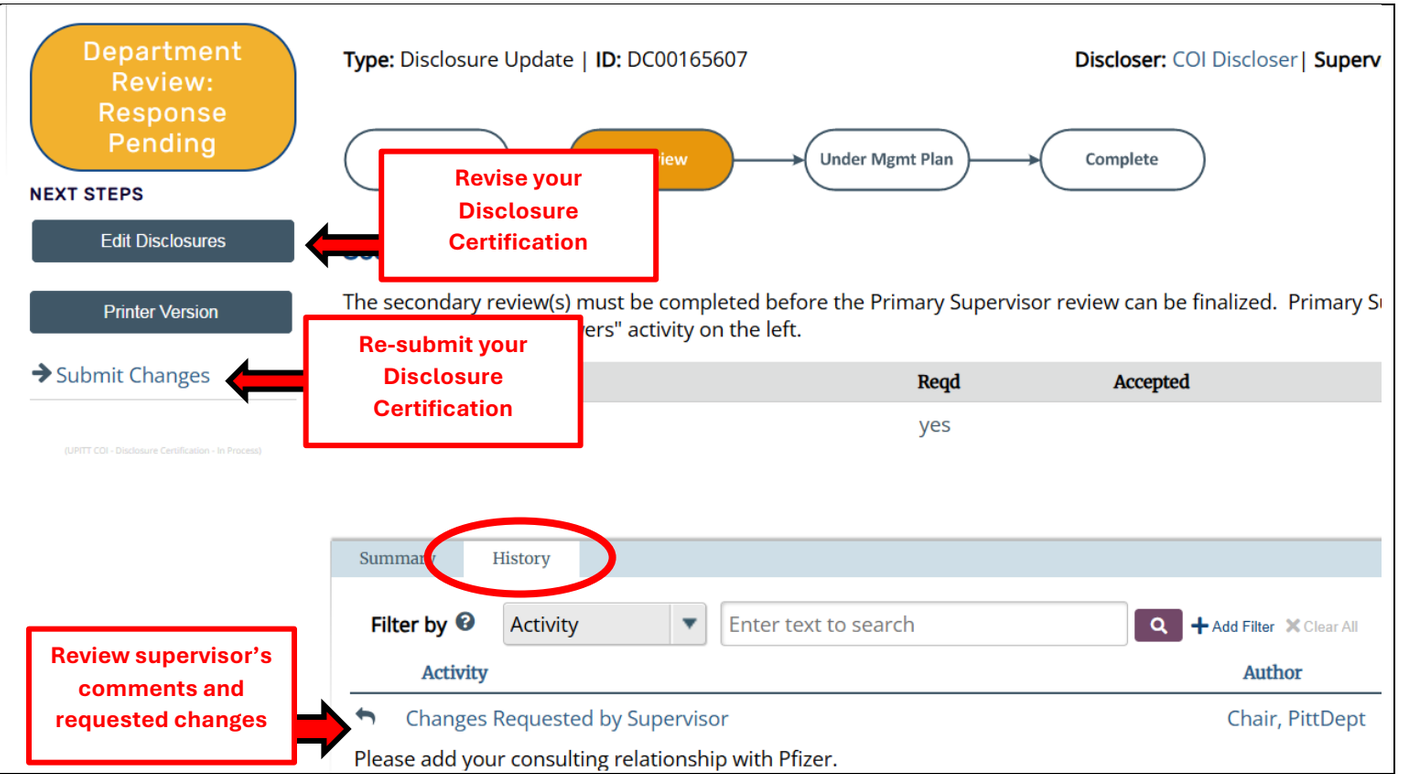


Review your supervisor's comments and requested changes by clicking on the **History** tab on the main Disclosure Certification page.

Discuss any questions about the requested changes directly with your supervisor.

Click **Edit Disclosures** to change your Disclosure Certification.

When you are finished revising, click **Submit Changes** to re-submit your Disclosure Certification.



Making changes after Supervisor Review

If you need to revise your Disclosure Certification after your supervisor approves it, you must submit a new **Update Certification**.