

# eDisclose User Guide:

## *How to Respond to Reviewer Notes*

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<b>Last Update</b>	<b>August 20, 2012</b>
<b>Intended Audience</b>	<b>Researcher/Owner of the Disclosure</b>
<b>Purpose</b>	<b>To provide the user with step-by-step instructions on how to respond to Reviewer Notes left on the disclosure by COI Staff</b>

**Use of Reviewer Notes:** When the COI Staff need additional information from the researcher/owner of the disclosure, the questions/comments can be relayed via the system using electronic notes called Reviewer Notes. The staff reviewer enters their notes directly onto the relevant page of the disclosure (called a 'SmartForm') to request a change to the form. The Researcher/Owner of the Disclosure must then respond to each reviewer note, as well as make the required changes in the Smartform.

### Follow the steps below to respond to reviewer notes from the COI Staff:

- STEP 1.** You will receive an email notification when the COI Staff have requested additional information of you via Reviewer Notes. Click the **Link to Workspace** within the email to be taken to the disclosure that requires your attention. If you are not already logged in, you will be prompted to do so. Use your JHEDID and password.

<b>JHU eDisclose: Do Not Reply</b>	<b>Additional Information Needed</b>
<b>Disclosure ID:</b>	TR00000257
<b>Discloser:</b>	User SON Tester
<b>Entity:</b>	Unlisted Company/Entity 1
<b>Link to Workspace:</b>	<a href="#">TR00000257</a>

Upon reviewing this disclosure, we found that additional information is needed. Please use the following steps to view, address, and respond to each of the reviewer's notes in the disclosure SmartForm:

Click the 'Link to Workspace' above to view the workspace.

1. Click the 'View/Edit Form' button to the left of the workspace.
2. Click the 'Next' button to navigate to the first page that contains reviewer's notes.
3. Select the 'Click here to respond' link on each reviewer note to view the comment/question. Type in your response in the text box and click 'OK'.
4. Each reviewer note will likely require revision(s) to that page of the disclosure as well, so be sure to also make any requested changes to your submission.
5. When you get to the final page of the form, click 'Finish' to return to the disclosure workspace.
6. Once all comments have been addressed and changes made to your disclosure, click the 'Submit' button to the left of the workspace.
7. **NOTE: Each reviewer's note must be responded to prior to re-submitting.**
8. **NOTE: ONLY THE FACULTY MEMBER WHO IS DISCLOSING CAN SUBMIT.**

**STEP 2.** Select the “View/Edit Form” button to open the disclosure SmartForm.

**Current Status**  
Waiting User Response

**Disclosure Workspace**

Owner: User SON Tester      eDisclose ID: TR00000257

Entity: Unlisted Company/Entity 1 - A Funny Test Entity Name      Legacy eOPC ID:

You will receive an email notification of the Review Outcome once the necessary staff and/or Committee reviews of this disclosure are complete.

Questions? Contact staff at: [REDACTED]

**Relationship Overview**

Outside Service	Fiduciary/Founder Role	Days Devoted Per Year
Consulting	Board of Directors	1.5
Data Safety Monitoring Board	Founder	
Legal Consulting/Medical-Legal	Officer/Manager/Director	

**STEP 3.** Reviewer Notes will appear at the top of the form, under the yellow bar.

➤ Where ever the message “Response Required!” appears you must provide a response.

**STEP 4.** Select the “Click here to respond...” link to provide your response in the pop-up form.

**Reviewer Note**    Next

Filter by Type [dropdown]    Go    Clear    Advanced

Type	Reviewer	Date Created	Date Modified
Pre Review	COI Staff SON Tester	8/17/2012 1:46 PM	8/17/2012 1:46 PM

Can you please revise Q1.0 below? Thanks.

**Response Required! Click here to respond...**

**The Johns Hopkins University  
Outside Interest and Commitment Disclosure Form**

Submit one disclosure for each entity and answer the questions to accurately reflect your current or proposed relationship with the entity (or that of your spouse, domestic partner or minor dependent(s)).

**STEP 5.** Select “Next”, on the yellow bar to view the next Reviewer Note. (Tip: The “Next” and “Previous” buttons will allow you to navigate back and forth to pages containing Reviewer Notes, while skipping pages that do not have any notes.)

**Reviewer Note**    Next    Previous

Filter by Type [dropdown]    Go    Clear    Advanced

Type	Reviewer	Date Created	Date Modified
Pre Review	COI Staff SON Tester	8/17/2012 1:46 PM	8/17/2012 1:46 PM

Can you please revise Q1.0 below? Thanks.

**Response Required! Click here to respond...**

- STEP 6.** Make all necessary changes to the form as you read each Reviewer Note.
- **Tip:** Almost all Reviewer Notes require you to do two things: Respond to the note, and make a revision to the relevant section of the disclosure form so that it becomes part of the disclosure itself.
- STEP 7.** Once you have responded to all reviewer notes and made the required changes in the disclosure, **Select** the “**Finish**” button on the last page and you will be taken back to the Disclosure workspace.
- **Tip:** You are **NOT** finished just yet! Your responses are NOT sent back to the COI Staff until the “Submit” activity on the workspace is selected.
- STEP 8.** If you are sure you have completed all required changes, select the “**Submit**” activity button on the left-hand side of the workspace.
- **NOTE:** Only the Faculty Member/Researcher can create and submit his or her own disclosure.

The screenshot shows the JHU eDisclose interface. At the top, it says "JHU eDisclose Disclosure and Review of Outside Interests and/or Financial & Fiduciary Interests". The user is logged in as "User SON Tester". The page title is "Page for User SON Tester > TR00000257".

The main content area is titled "Disclosure Workspace". It shows the following information:

- Current Status:** Waiting User Response
- Owner:** User SON Tester
- eDisclose ID:** TR00000257
- Entity:** Unlisted Company/Entity 1 - A Funny Test Entity Name
- Legacy eOPC ID:**

There are several buttons on the left side: "View/Edit Form", "Print Disclosure", "View Differences", "Submit" (with a green arrow), "Request Withdraw", and "Contact Staff".

Below the buttons, there is a "Relationship Overview" table:

Outside Service	Fiduciary/Founder Role	Days Devoted Per Year
Consulting	Board of Directors	1.5
Data Safety Monitoring Board	Founder	
Legal Consulting/medical-legal	Officer/Manager/Director	

- The system checks for completeness and will show validation errors (such as required questions that have not been answered, or reviewer notes that have not been responded to).
- All Error/warning messages must be resolved before the disclosure can be submitted. Click the hyperlinked Section number from the list to go the page where issues can be resolved.

Error/Warning Messages			Refresh
Message	Field Name	Jump To	
<p>Pre Review: Author: COI Staff SON Tester</p> <p>Can you please revise Q1.0 below? Thanks.</p>		1 - Relationship Overview	
<p>Pre Review: Author: COI Staff SON Tester</p> <p>Can you please uncheck Consulting in Q1.0 below? Thanks.</p>		2 - Outside Services	

Close

**STEP 9.** After all error/warning messages are resolved, save and exit the SmartForm, and select the “**Submit**” activity again on the disclosure workspace.

**STEP 10.** Read and confirm the Certification text, and then select “**OK**”.

- You may need to scroll slightly down to see the OK button.

Disclosure

## Submit

**1.0** \* I agree that the information I have provided in this disclosure, as it relates to Unlisted Company/Entity 1, is true and accurate to the best of my knowledge.

Yes  No [Clear](#)

**2.0** Use the text area below to communicate any time sensitive deadlines or issues that may impact the processing of this disclosure.

**Click OK below to complete this activity.**

**STEP 11.** Two events will let you know that the disclosure has been successfully submitted back to the COI Staff:

- First, you will receive an email from the system verifying receipt of your submission, and explaining that no action is required of you at this time.
- Second, the Current Status of the disclosure will change to Submitted. This means that the disclosure now appears back in the COI Staff’s workspace or “Inbox” where they can continue processing your disclosure.

**JHU eDisclose** Disclosure and Review of Outside Interests and/or Financial & Fiduciary Interests User SON Tester | My Home | Projects | Logoff

All Disclosures Help Desk

Page for User SON Tester > TR00000257

**Current Status**

Submitted

View Form

Print Disclosure

View Differences

Request Withdraw

Contact Staff

### Disclosure Workspace

**Owner:** User SON Tester **eDisclose ID:** TR00000257

**Entity:** Unlisted Company/Entity 1 - A Funny Test Entity Name **Legacy eOPC ID:**

- You will receive an email notification of the Review Outcome once the necessary staff and/or Committee reviews of this disclosure are complete.

**Questions?** Contact staff at [REDACTED]

**Relationship Overview**

Outside Service	Fiduciary/Founder Role	Days Devoted Per Year
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Data Safety Monitoring Board	Founder	
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**STEP 12.** Your disclosure has been submitted and review has been resumed. If the COI Staff have questions, they will contact you. To return to your workspace, you can select **“My Home”** located in the top left corner.

**JHU eDisclose** Disclosure and Review of Outside Interests and/or Financial & Fiduciary Interests User SON Tester | My Home | Projects | Logoff

All Disclosures Help Desk

Page for User SON Tester > TR00000257

**Current Status**

Submitted

View Form

Print Disclosure

View Differences

Request Withdraw

Contact Staff

### Disclosure Workspace

**Owner:** User SON Tester **eDisclose ID:** TR00000257

**Entity:** Unlisted Company/Entity 1 - A Funny Test Entity Name **Legacy eOPC ID:**

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