

eDisclose User Guide:

Getting Started

Last Updated: August 20, 2012

Recommended Web Browsers

For the best experience use one of the following recommended browsers:

| Platform | Browser |
|----------------------------------|--|
| Microsoft Windows (all versions) | Internet Explorer 7 or later, Firefox 7 or later, Chrome* 9 or later |
| Apple Mac OS X 10.4x or later | Safari 4 or later, Firefox 3 or later |

System Login

The eDisclose system is located at: <http://edisclose.jhu.edu>. Users can login using their JHEDID and password. Many user accounts were created prior to go-live, but if you have trouble logging in or if you need an account created for you, contact the COI Staff at your school for assistance:

| | | |
|--|--|--------------|
| Bloomberg School of Public Health | mhallacy@jhsph.edu | 410.502.0433 |
| Krieger School of Arts and Sciences | cemerson@jhu.edu | 410.516.4820 |
| School of Medicine | policy@jhmi.edu | 410.516.5560 |
| School of Nursing | mdenny1@jhu.edu | 443.287.2902 |
| Whiting School of Engineering | cemerson@jhu.edu | 410.516.4820 |

Getting Help

The **eDisclose Help Desk** page is available in the system (after login) and contains guides, resources, and FAQs to help you become acquainted with the eDisclose system. It is recommended that you peruse these documents prior to using the system as well as any time you have a basic question, as it will be updated regularly.

JHU eDisclose Disclosure and Review of Outside Interests and/or Financial & Fiduciary Interests

User SON Tester | My Home | Projects | Logoff

All Disclosures **Help Desk**

Help Desk Subscribe Help

Help Desk

Welcome to the eDisclose Help Desk. This area of the system contains contact information for the COI staff, frequently asked questions, user guides, and other helpful documents for users. Check back often for up-to-date resources.

COI Staff

If you have questions or are experiencing technical difficulties, contact the COI Staff from your school.

| School | Email | Phone |
|-------------------------------------|--|--------------|
| Bloomberg School of Public Health | mhallacy@jhsph.edu | 410.502.0433 |
| Krieger School of Arts and Sciences | cemerson@jhu.edu | 410.516.4820 |
| School of Medicine | policy@jhmi.edu | 410.516.5560 |
| School of Nursing | mdenny1@jhu.edu | 443.287.2902 |
| Whiting School of Engineering | cemerson@jhu.edu | 410.516.4820 |

Resources

If your questions are not answered by the Help Desk resources or you need regulatory/process assistance, please contact the COI Staff for your school.

Anatomy of the System

As a researcher/Faculty, when you log into eDisclose you should be taken to the **“My Disclosures”** workspace, which contains the disclosures you created. This can be considered your “home page” or “Inbox”.

The screenshot below points out key areas of this workspace:

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 Layout Properties

My Disclosures 7

Create Disclosure 8

Create Gift Disclosure

My Disclosures

The following is a brief summary of all relationships you have disclosed. If you need to update or end a relationship, click on the Disclosure ID Number, then select the "Update Disclosure" button. If you need to disclose a new relationship, select "Create Disclosure" on the left.

1 2

My Disclosures My Gift Disclosures

Use the Filter by drop-down list to select a search value. Type the percent sign (%) and a keyword into the search box. Then click Go. From the results list, click the Name to open the Disclosure workspace.

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Pending My Action

Filter by Name Go Clear Advanced

| Name 3 | Entity 4 | Date Submitted | State 5 |
|-------------------------------------|---------------------------|----------------|-----------------------|
| TR00000286 | Unlisted Company/Entity 1 | | User Submission Prep |
| TR00000295 | Unlisted Company/Entity 1 | | User Submission Prep |
| TR00000633 | Unlisted Company/Entity 1 | | User Submission Prep |
| TR00000634 | Unlisted Company/Entity 1 | | User Submission Prep |
| TR00000906 | Unlisted Company/Entity 3 | | User Submission Prep |
| Update: UPD00000285 For: TR00000189 | Unlisted Company/Entity 1 | 7/16/2012 | Waiting User Response |

Active Relationships

Filter by Name Go Clear Advanced

| Name | Entity | Fiduciary/Founder Role | Time Devoted per year | Related Research | Tech | Date Submitted | State |
|-------------------------------------|---------------------------|------------------------|-----------------------|------------------|------|----------------|-----------------|
| TR00000189 | Unlisted Company/Entity 1 | yes | 200 | yes | yes | 6/20/2012 | Review Complete |
| TR00000257 | Unlisted Company/Entity 1 | yes | 1.5 | no | yes | 6/29/2012 | Submitted |
| TR00000278 | Unlisted Company/Entity 5 | no | 1.5 | no | no | 7/16/2012 | Review Complete |
| TR00000284 | Unlisted Company/Entity 1 | yes | 2.3 | yes | yes | 7/16/2012 | Submitted |
| TR00000635 | Unlisted Company/Entity 1 | yes | 3 | yes | yes | 8/1/2012 | Review Complete |
| TR00000636 | Unlisted Company/Entity 1 | yes | 23 | yes | yes | 8/2/2012 | Review Complete |
| TR00000638 | Unlisted Company/Entity 1 | yes | 2.5 | yes | yes | 8/8/2012 | Review Complete |
| Update: UPD00000274 For: TR00000189 | Unlisted Company/Entity 1 | yes | 200 | yes | yes | 7/16/2012 | Submitted |

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Inactive Relationships

Filter by Name Go Clear Advanced

No data to display.

10 / page

Below is a description of each numbered item indicated on the workspace above:

1. **My Disclosures:** This tab contains disclosures that you created. It is broken into groups (Pending My Action, Active Relationships, and Inactive Relationships). Check this tab frequently to see if any disclosures are pending your action.
2. **My Gift Disclosures:** This tab contains gift disclosures that you created.
3. **Name:** The 'Name' is the ID Number of the disclosure. If you click on the number, you will be taken to the workspace of that disclosure, where you can perform various activities.
4. **Entity:** The 'Entity' is the name of the Entity you have selected on that Disclosure form.
5. **State:** The 'State' indicates where the disclosure is in the review/workflow process.

6. **Filter bar:** This feature allows you to filter the contents of a section by the headings it contains, such as keywords in the 'Name', Disclosure ID #, State. The percent sign (%) is used as a "wildcard" to search for a part of a word or phrase. **Ex. To search for disclosures in the Waiting User Response state, you could search by "%Wait".**
7. **Create Disclosure:** This activity button allows you to create a New Disclosure. Only the Faculty Member/Researcher can create and submit his or her own disclosure.
8. **Create Gift Disclosure:** This activity button allows you to create a New Gift Disclosure. Only the Faculty Member/Researcher can create and submit his or her own gift disclosure.
9. **Help Desk:** This area of the system contains guides, resources, and FAQs to help you become acquainted with the system.
10. **My Home:** 'MyHome' is located at the top-right corner of any screen in the system. You may use My Home at any time to be returned to your workspace, or "home page".