eDisclose User Guide: *How to Submit a New Disclosure*

Last Update	August 20, 2012	
Intended Audience	Researcher/Owner of the Disclosure	
Purpose To provide the user with step-by-step instructions on how to submit a new di		

Please first refer to the eDisclose Getting Starting Guide before continuing.

NOTE: <u>Only</u> the Faculty Member/Researcher can create and submit his or her own disclosure.

Follow the steps below to submit a new disclosure:

- **STEP 1. Close** all open web browsers.
- STEP 2. Open a new browser and go to: http://edisclose.jhu.edu
- **STEP 3.** Login using your JHEDID and password.
- **STEP 4. Select** the "**Create Disclosure**" button on the left.

JHU eDiscl	OSE Disclosure and Review of Outside Interests and/or Financial & Fiduciary Interests	User SON Tester My Hom	e Projects	Logoff
All Disclosures Help Desk				
Page for User SON Tester			Layout P	properties
My Disclosures Create Disclosure Create Gift Disclosure	My Disclosures The following is a brief summary of all relationships you have disclosed. If you need to update or environment, then select the "Update Disclosure" button. If you need to disclose a new relationship, selections and the selection of the 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 click the Name to open the Disclosure workspace.	e search box. Then click Go . Fro	m the results	list,
	Pending My Action			

- **STEP 5.** Section 1 of the SmartForm will appear.
 - All required questions (indicated with a red asterisk *). Section 1 must be answered in order for the disclosure to be created and saved in the system.
- **STEP 6. Select "Continue"** to proceed through the remaining sections of SmartForm. Answer the questions in the remaining sections any way you would like.
 - > Every time you select "**Continue**" your work is automatically saved.
 - If you select "Back" your work will NOT be saved. Select "Save" before you click the "Back" button
 - You may select "**Save**" at any time and exit the SmartForm.

		JHU eDisclose	Disclosure and Review of Outside Interests and/or Financial & Fiduciary Interests	Edit: Transactions - TR00000286
(<< Back		Save Exit Hide/Show Errors Print Jump To: 1 - Relationship Overview -	Continue >>

STEP 7. Select "Finish" on the last page of the SmartForm – Final Page, you will be automatically taken to the Disclosure workspace, where you can view the Current Status of the Disclosure, view an overview of the relationship, and run activities.

	ure and Review of Outside Interests and/or al & Fiduciary Interests	Edit: Transactions - TR00000286
<< Back	Save Exit Hide/Show Errors Print Jump To: Final -	Finish
		Disclosure
9 - Final Page		
You're almost finished.		
Select the "Finish" button on the right to revi	iew a summary of your relationship with the entity before submitting this disclosure for i	Periew.
<< Back	Save Exit Hide/Show Errors Print Jump To: Final -	Finish

- **NOTE:** The SmartForm has not yet been submitted for review at this point.
- If you need to make additional changes to the disclosure, select the "View/Edit Form" button on the right side to open the SmartForm again and resume working on it until it is complete.
- **STEP 8. Select** the "**Submit**" activity button, located on the left side to check for errors and warning messages. **Read** the Certification text, complete the form by answering Question 1.0, and if needed, 2.0.
 - NOTE: Only the Faculty Member/Researcher can create and submit his or her own disclosure.

JHU eDisclose	Disclosure and Review of Outside Interests Financial & Fiduciary Interests	and/or	User SON Tester My Home P	rojects Logoff
All Disclosures Help Desk				
All Disclosures > TR00000286				Layout
Current Status	Disclosure Workspace			
User Submission Prep	Owner: User SON Tester		eDisclose ID: TR00000286	
View/Edit Form	Entity: Unlisted Company/Entity 1 TE	xt for unlisted entity	Legacy eOPC ID:	
Print Disclosure View Differences		nd information in your disclosure are correct and ed to make revisions prior to submission.	d you are ready to submit for review.	
	Questions? Contact staff at mdenny1	@jhu.edu or 443.287.2902.		
Submit Withdraw	Relationship Overview			
Contact Staff	Outside Service	Fiduciary/Founder Role	Days Devoted Per Year	

- > If the system finds validation errors they will be displayed for you.
- **STEP 9. Resolve** all warning/error messages that are listed by selecting the Section Number from the list. You will be taken directly to the section of the SmartForm that contains the required question(s) that have been left unanswered where you can correct your answers.
 - > Once all warning/error messages have been resolved **proceed to Step 9 to Submit**.

Err	or/Warning Messages			Refresh
	Macaza	Field Name	lump To	
	Message This is a required field; therefore, you must provide the required information.		Jump To 1 - Relationship	Overview
				Close

- **STEP 10.** Select the "Submit" activity button.
 - You will note that the Status on the top left of the application workspace changes from "User Submission Prep" to "Submitted".
 - The Disclosure will now appear in the appropriate COI Staff's workspace where they can begin processing your submission.
 - You will receive an email that confirms the submission of the Disclosure.

JHU eDisclose	Disclosure and Review of Outside Interest Financial & Fiduciary Interests	is and/or	User SON Tester My Home Projects Logol
All Disclosures Help Desk			
Page for User SON Tester > TR0000025	7 > Update: UPD00005691 For: TR0000	00257	
Current Status Submitted	Update Workspace		eDisclose ID: UPD00005691
View Form	Entity: Unlisted Company/Entity 1 -	A Funny Test Entity Name	Legacy eOPC ID:
Print Disclosure View Differences	 You will receive an email notified 	cation of the Review Outcome once the	necessary staff and/or Committee reviews of this disclosure are complete.
	Questions? Contact staff at		
Request Withdraw	Relationship Overview		
	Outside Service	Fiduciary/Founder Role	Days Devoted Per Year
		Board of Directors Founder Officer/Manager/Director Other	1.5