

eDISCLOSE

DISCLOSER GUIDE

- Getting Started
- Creating an FCOE Disclosure
- Creating an Outside Activity Disclosure
- Submitting Disclosures
- Post-Submission Actions



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Welcome!

We are pleased to introduce the University of South Florida's new disclosure and review system for State of Florida Code of Ethics for Public Officers and Employees (FCOE) and outside activity —commonly referred to as eDisclose.

You probably have lots of questions about this great new tool: What is it? What does it do? How does it work? What are the benefits of using it? Who will provide training and guidance?

This manual will answer many of your questions, and it will provide you with specific guidance that will help you meet your FCOE and outside activity acknowledgement and disclosure responsibilities successfully.

Section One: Let's Get Started

It is important for you to have a baseline understanding of what eDisclose is and what it can do for you. Here are some answers to the most commonly asked questions.

What is eDisclose?

eDisclose is an online system for disclosing and reviewing Florida Code of Ethics for Public Officers and Employees ([FCOE](#)) and outside activities made by USF employees. This system assists employees in meeting their annual disclosure and acknowledgement responsibilities under Florida Statute §112.313, [USF Regulation 10.107](#), and [USF Policy 0-027](#).

What does it do?

The eDisclose system guides and documents employee-disclosed FCOE relationships, the employment of related persons (nepotism), and proposed outside activity. Likewise, the system guides and documents the review of such disclosures by institutional officials. The following complex statutory requirements and restrictions placed upon USF Employees are addressed within eDisclose:

- Involvement in certain types of **business, employment, or contractual relationships**;
- Employment of a related person in situations that could lead to **nepotism**;
- Soliciting or accepting **gifts**;
- **Misuse of Public Position or Non-Public Information**;
- Engaging in certain **outside activities** that have the potential to create a conflict of interest or commitment.

Meaning employees use eDisclose to meet their annual FCOE disclosure and acknowledgement requirement; disclose nepotism, and disclose outside activity. USF administration uses eDisclose to review FCOE, nepotism, and outside activity disclosures in accordance with USF regulation and policy; and monitor compliance with same.

What are the benefits of using eDisclose?

The eDisclose system provides employees with an efficient, effective means of meeting their annual disclosure and acknowledgement requirements under the FCOE and USF Policy 0-027.

Some the benefits of the eDisclose system over the “old” paper-based system are:

- Automated reminders of due dates.
- Automated disclosure routing to appropriate reviewers.
- Real-time status updates regarding the review and approval of your disclosures.
- Process transparency, meaning you can log in anytime from anywhere and see who last touched your disclosure, when, and what they did with it.
- Email buttons that look like the blue-and-white envelope icon pictured below are placed throughout so that you can request compliance advice or technical support when you need it.



- Tip buttons that look like the grape-and-white light bulb icon pictured below are placed throughout to provide you with tips and tricks for using the features of eDisclose or to provide you with guidance on a topic area.



How does eDisclose work?

As employees navigate through the eDisclose System they are provided with education pages and then, when appropriate, they are asked a series of questions designed to assist them in determining whether or not their particular situation must be disclosed.

Employees disclosing in eDisclose are called “Disclosers”. Institutional Officials responsible for reviewing disclosures in eDisclose are called “Reviewers”. Based on a Discloser’s answers, eDisclose will forward their disclosure to the appropriate Reviewer as follows:

- **Business, Employment, or Contractual Relationship** disclosures are forwarded to the USF Compliance & Ethics Program.
- **Nepotism** and **Outside Activity** disclosures are forwarded for sequential review based on the hierarchy for the Discloser’s organizational unit:
 - 1) **Supervisor**—the Discloser’s direct Supervisor as recorded in GEMS.
 - 2) **Manager**—the individual responsible for the Discloser’s organizational unit, e.g. Chair, Dean, Director.
 - 3) **Senior Manager**—the Provost, Vice President, or Regional Chancellor responsible for the Discloser’s organizational unit

The Reviewer will complete their review within the eDisclose system. Once a final review determination has been made, eDisclose will send an automated email to the Discloser requesting that they acknowledge the final review decision. A disclosure will remain open in the system until such acknowledgement is made by the Discloser.

Who will provide training and guidance?

Training for the eDisclose system is provided by the USF Compliance & Ethics program through its [online materials](#), face-to-face workshops, and consultation via email at eDisclose@usf.edu or by calling 813-974-2705.

Guidance for specific compliance topics covered by the eDisclose system is provided by subject matter experts and is based on the Discloser’s employee type as follows:

Outside Activity Guidance

Faculty members without a USF Health appointment should contact the [USF Office of the Provost](#) for assistance at 813-974-2145.

USF Health Faculty should contact [USF Health Faculty and Academic Affairs](#) for assistance by calling 813-974-1676. It is important to remember that USF Health outside activity disclosures are NOT made in the eDisclose system, but rather are made in USF Health's Reporting Outside Activities Database (ROAD), available online at <https://hscf.hsc.usf.edu/road/> .

Administration, Staff, and Temporary employees should first discuss the activity their supervisor. If additional assistance is needed, they should contact the [USF Compliance & Ethics Program](#) by emailing eDisclose@usf.edu or phoning 813-974-2705.

Nepotism Guidance

Faculty members should direct questions about the employment of a related person in their organizational unit or a related organizational unit to the [USF Office of the Provost](#) by calling 813-974-2145.

Administration, Staff, and Temporary employees should direct nepotism questions to the [USF Compliance & Ethics Program](#) by phoning 813-974-2705 or emailing eDisclose@usf.edu.

Gifts or Conflicting Business Relationships Guidance

Contact the [USF Compliance & Ethics Program](#) by emailing eDisclose@usf.edu or phoning 813-974-2705.

eDisclose Help Desk

If you have technical questions about eDisclose, the eDisclose Help Desk is available during regular business hours at 813-974-9312 and by email at eDisclose@usf.edu.

Section Two: Accounts

In order to create and submit a disclosure in eDisclose, you must have an activated USF NetID account.

Create an Account

USF Tampa employees without a NetID can request one from USF Information Technology (IT) at the following link: <https://netid.usf.edu/una/?display=activate> . If you have forgotten your NetID password or need additional assistance with your NetID account, you can contact the IT Help Desk 24/7 by calling 866-974-1222, or by emailing help@usf.edu. You may also visit the Help Desk in person at the USF Tampa campus Library in room LIB 117.

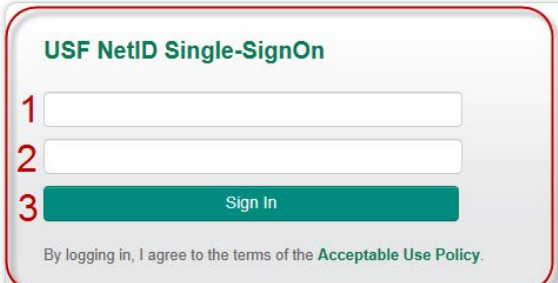
USF St. Petersburg (USFSP) employees without a NetID can request one from the Campus Computing Help Desk by calling 727-873-4357 or by emailing helpdesk@usf.sp.edu. You may also visit them in person at their physical location in BAY 226.

USF Sarasota-Manatee (USF-SM) employees without a NetID can request one from USF-SM Technology Services by calling (941) 359-4350 or by emailing computing@sar.usf.ed. USF-SM employees can bring their issues and requests to them for resolution in person on the third floor in room A-304.

Login

On the *myUSF* portal, accessible via <http://my.usf.edu>:

- 1) Enter your NetID.
- 2) Enter your NetID password.
- 3) Click on the **Sign In** button to log into *myUSF*.



USF NetID Single-SignOn

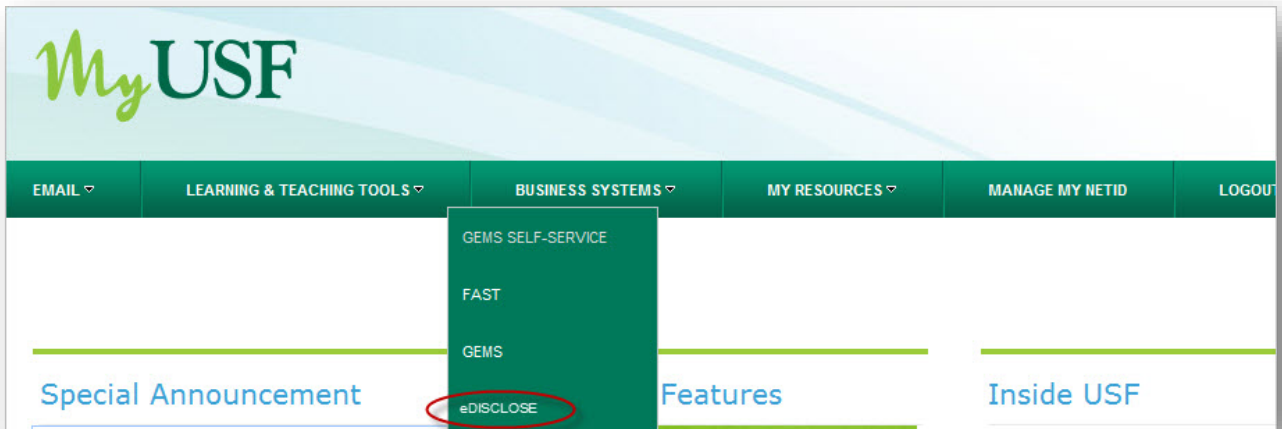
1

2

3

By logging in, I agree to the terms of the [Acceptable Use Policy](#).

When the *myUSF* Portal opens, choose eDisclose from the Business Systems drop-down menu.



Forgot your User Name or Password?

If you ever forget your NetID account credentials, you can always contact your institution's IT Help Desk:

Tampa Campus
IT Help Desk
help@usf.edu
866-974-1222; LIB 117

Sarasota-Manatee Campus
Technology Services
computing@sar.usf.edu
941-359-4350; Third floor in A-304.

St. Petersburg Campus
Campus Computing Help Desk
helpdesk@usf.sp.edu
727-873-4357; BAY 226

Section Three: FCOE Disclosures

It's important for all USF employees to have a baseline understanding of their annual Florida Code of Ethics (FCOE) disclosure and acknowledgement responsibilities; and how to meet these requirements using eDisclose.

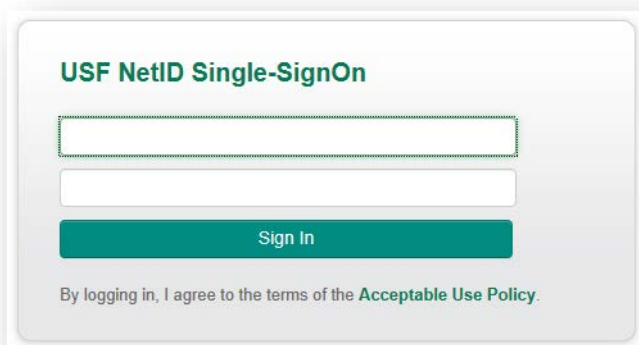
FCOE Disclosure Requirements

All USF Faculty, Administration, and designated Staff and Temporary employees are required to complete and submit an annual disclosure and acknowledgment of their responsibilities under the Florida Code of Ethics for Public Officers and Employees (an "FCOE Disclosure"). FCOE disclosures must be made in the FCOE module of the eDisclose system periodically as follows:

1. **Annually**; AND
2. **Immediately** upon discovering or acquiring a change to a previously submitted FCOE Disclosure, such submissions require the submission of a new FCOE disclosure for review and approval.

Creating a new FCOE Disclosure

To meet your FCOE disclosure and acknowledgement responsibilities, log into *myUSF* at <http://my.usf.edu> using your USF NetID and open eDisclose from the Business Systems drop-down menu.



The image shows a login form titled "USF NetID Single-SignOn". It features two input fields for text entry, a teal "Sign In" button, and a line of text at the bottom that reads "By logging in, I agree to the terms of the [Acceptable Use Policy](#)."

This will open your eDisclose “Home Page”. To create an FCOE Disclosure, select **New FCOE Disclosure** button on the left-hand tool bar of your Home Page. This will open a new FCOE SmartForm.



For more details on how to work with SmartForms, consult Section Six: Addendum in this manual.

USF UNIVERSITY OF SOUTH FLORIDA SYSTEM eDISCLOSE

Welcome Disclosures

Page for John Discloser

eDisclose Discloser

My Roles

eDisclose Discloser

Create...

New FCOE Disclosure

Disclose Outside Activity

New Outside Activity

Page for John Discloser

Welcome to your Personal Disclosure Workspace. Here you can review and determine. Specifically you can:

- Create a new disclosure using one of the activity buttons
- View disclosures needing your review and action on them
- View a history of all your disclosures on the **All Disclosures** page
- Access more specifics about a particular disclosure by clicking on the disclosure ID

Use % as a wild card when filtering information on the All Disclosures page

Inbox All Disclosures

Filter by ID

ID	Name	Date Modified
DISC-00000282	2014 Disclosure - John Discloser	3/25/2014 12:18 PM
DISC-	2014 Disclosure - John	3/24/2014 2:58 P


Completing your FCOE Disclosure

The FCOE SmartForm begins with an orientation section consisting of a welcome page; an overview of the eDisclose system, including an overview of how employee-provided disclosures are forwarded for review by the appropriate institutional official; and an explanation of your FCOE and Outside Activity disclosure responsibilities.

Welcome!

The *eDisclose* system is designed to inform and guide you through the complex statutory requirements and restrictions placed upon USF System employees under the State of Florida Code of Ethics for Public Officers and Employees (FCOE), USF System Regulation 10.107, and USF System Policy 0-027 with respect to:

- Involvement in certain types of **business, employment, or contractual relationships**; and
- Employment of a **related person** in situations that could lead to **nepotism**;
- Soliciting or accepting **gifts**;
- Using our anonymous reporting hotline, **EthicsPoint**;
- Engaging in certain **outside activities** (OAs) that have the potential to create a **conflict of interest or commitment**



0.0

After the orientation section, you are routed to the sections of the FCOE disclosure form which pertain specifically to your employee type (i.e., faculty, administration, or designated staff or temporary). For each annual FCOE disclosure topic area (e.g. business, employment, & contractual relationships; gifts; nepotism; etc.), you will first view a brief training page and then be asked to answer a series of questions about your specific situation. Based upon your answers, you will be routed to additional form pages and asked to provide more detail. Below is an example of such a training page (Page 1.0) and its subsequent disclosure page of the form (Page 1.1).

Business, Employment, & Contractual Relationships

USF Employees are prohibited from certain employment and contractual relationships with business entities also doing business with the USF System because they may create an impermissible conflict of interest.

- While acting in a private capacity, employees may not rent, lease, or sell any realty, goods, or services to the USF System (unless a **statutory exemption** applies).
- No employee may be employed by or have a contractual relationship with a **business entity** also doing business with the USF System (unless a statutory exemption applies).
- No employee acting as a **purchasing agent** may do business on behalf of the USF System with a business entity in which they, their spouse, or their child serves as an officer, partner, director, or proprietor; or has a **material interest** (unless a statutory exemption applies).
- No employee participating in the procurement of **contractual services** may become or be the employee of a person or business entity contracting with the USF System.

For more guidance regarding exemptions to certain business, contractual, and employment relationships, consult USF System Policy 0-027, or contact a compliance professional in the Compliance & Ethics Program.

You might be a purchasing Agent if...

You have the authority to choose both what will be purchased for USF and where it will be purchased.

e.g. If you choose to buy widgets for USF (the "what") and you require your Office Manager to buy those widgets only from Wal-Mart (the "where"), you are considered a "Purchasing Agent" under the Florida Statutes, even if you didn't personally fill out any of the requisition/purchase order paperwork.

In contrast, if in this same scenario,



1.0

Selling to the USF System

Selling to the USF System may be prohibited and require review of an employee's specific situation to determine if statutory exemptions apply.

1.1.1 * Are you renting, leasing, or selling any realty, goods, or services to the USF System?

Yes, currently
 Yes, plan to do so within the next 12 months
 No

If Yes, Please describe:

Once you have answered all the FCOE questions pertaining to your specific situation, the eDisclose system will summarize your disclosure on the **Florida Code of Ethics (FCOE) Summary** page. Review this page for accuracy.


Florida Code of Ethics (FCOE) Summary


Please review the below summary of your Florida Code of Ethics (FCOE) disclosure for accuracy. If correct, then click on "Save", located on the top and bottom toolbars on this page, to save your FCOE disclosure within the eDisclose system.

You have disclosed that you may have the following FCOE-restricted business, employment, or contractual relationship (s):

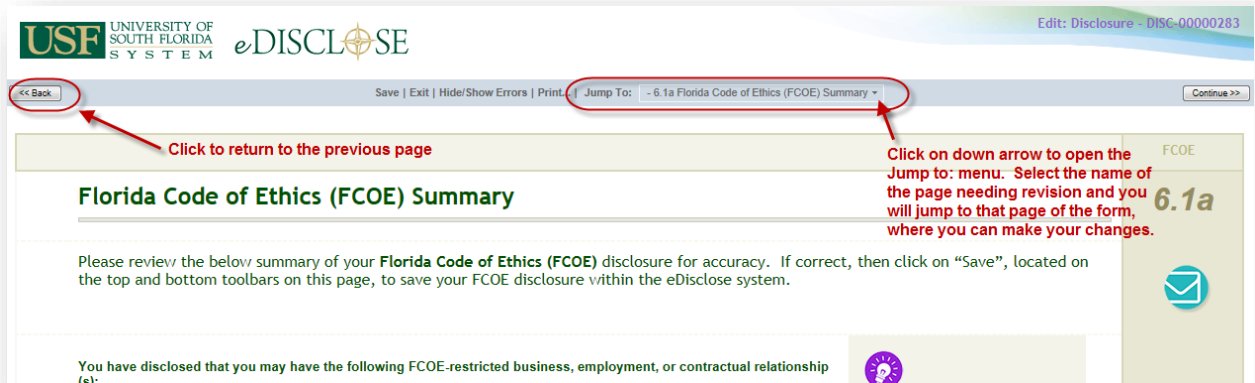
Selling to the USF System:
No
 Vendor Relationships (Employment/Contractual):
Yes, currently
 Vendor Relationships (Material Interest):
No
 Contractual Services Participation:
no
 Employment of a related person:
no

Check your responses for accuracy.

 If you need to change your disclosure, use the "Back" buttons located on the left-hand side of the top and bottom toolbars on this page to modify your answers.

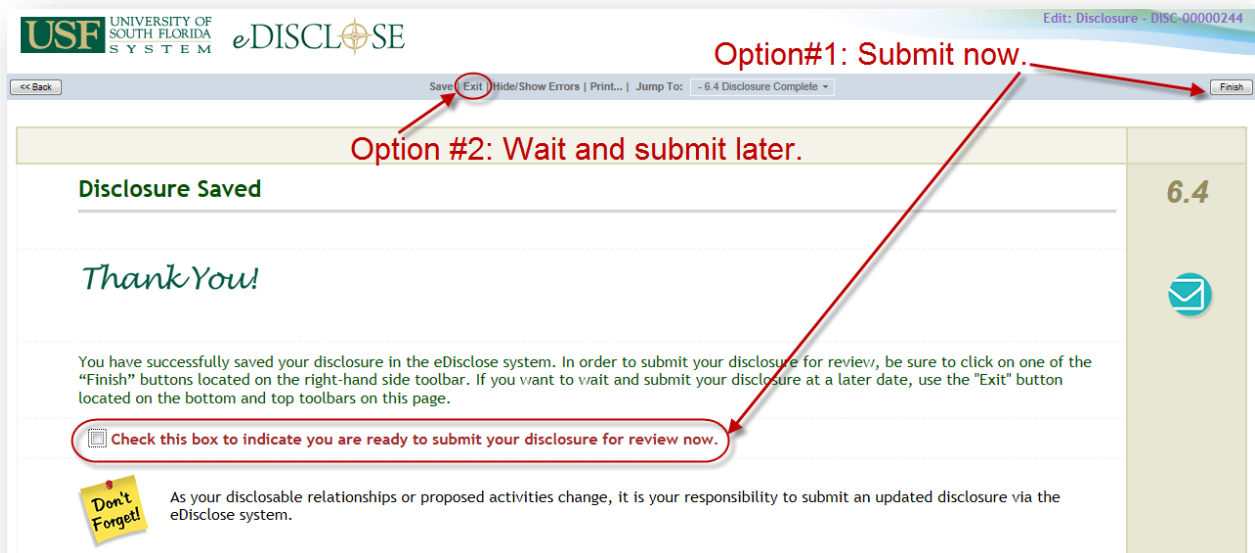
 As your disclosable relationships or proposed activities change, it is your responsibility to submit an updated disclosure via the eDisclose system.

If you need to modify your answers, use the **Back** button or the **Jump To:** drop-down menu to navigate to the page of the form needing revision.



If the information presented is correct, then click the **Continue** button, which will bring you to the **Disclosure Saved** page. This page indicates that you have successfully saved, but not submitted, your disclosure in eDisclose. At this point you have one of two options to submit your disclosure:

- Option#1—Submit now by checking the checkbox and then clicking on **Finish** button
- Option #2—Wait and submit later by clicking on **Exit** in the navigation bar.



Section Four: Outside Activity Disclosures

It's important for all USF employees to have a baseline understanding of their outside activity disclosure responsibilities; and how to meet these requirements using eDisclose.

Outside Activity Disclosure Requirements

Outside activity is any activity which is not part of a USF employee's assigned duties and for which the USF does not provide compensation. All USF employees are required to disclose and receive prior approval for outside activity involving any of the following:

- More than incidental **use of USF facilities, equipment, or services**;
- **Supervision of a USF student or employee** you also supervise or evaluate as part of your USF job;
- **Waiver or assignment of rights to inventions or works**, yours or the USF;
- **Candidacy for or holding public office**;
- Any **compensated activity**, which after discussion with your supervisor, he or she requests that disclose the activity for review and approval in eDisclose; except for faculty, who are required to disclose any **professional, compensated activity**;
- Any other outside activity that you should reasonably conclude may create a conflict of interest or commitment.

Examples of outside activities can include, but are not limited to, employment, private practice, private consulting, teaching, research, or service on boards or commissions.

As of July 1, 2014, all USF employees are required to submit their outside activities through the **Outside Activity module** of the eDisclose system; except for employees with a USF Health faculty appointment, who will continue to disclose their outside activities in USF Health's Reporting Outside Activity Database (ROAD), available online at <https://hscf.hsc.usf.edu/road/>.

Disclosure Requirements for Previously Disclosed and Approved Outside Activities

- The approval period for an Outside Activity cannot exceed 12 months from the date of initial approval; meaning once an approved outside activity exceeds 12 months, employees must submit a new outside activity for review and approval.
- Material changes in Outside Activity disclosures require the submission of a new Outside Activity disclosure for review and approval.

Creating an Outside Activity Disclosure

To meet your outside activity disclosure responsibilities, log into *myUSF* at <http://my.usf.edu> using your USF NetID and open eDisclose from the Business Systems drop-down menu.



The image shows a login form titled "USF NetID Single-SignOn". It features two input fields: a top field with a dotted border and a bottom field with a solid border. Below the fields is a teal "Sign In" button. At the bottom, there is a line of text: "By logging in, I agree to the terms of the [Acceptable Use Policy](#)."

This will open your eDisclose “Home Page”. To create an Outside Activity disclosure, select the **New Outside Activity** button on the left-hand tool bar of your Home Page. This will open a new Outside Activity **SmartForm**.



For more details on how to work with SmartForms, consult Section Six: Addendum.

The screenshot shows the eDisclose Discloser interface. At the top, there are logos for USF University of South Florida System and eDISCLOSE. Below the logos, the page title is "Page for John Discloser". On the left-hand side, there is a navigation menu with a red header "eDisclose Discloser". Under "My Roles", there is a link "eDisclose Discloser". Under "Create...", there is a button "New FCOE Disclosure". Under "Disclose Outside Activity", there is a button "New Outside Activity" which is highlighted with a red circle and a red arrow points to it. On the right-hand side, there is a main content area with the title "Page for John Discloser" and a welcome message: "Welcome to your Personal Disclosure Workspace. Here you can review and determination. Specifically you can:". Below the welcome message, there is a list of actions: "Create a new disclosure using one of the activity buttons", "View disclosures needing your review and action on them", "View a history of all your disclosures on the All Disclosures page", and "Access more specifics about a particular disclosure by clicking on the disclosure ID". Below the list, there is a tip icon and text: "Use % as a wild card when filtering information on the All Disclosures page". At the bottom, there is a table with columns "ID", "Name", and "Date Modified". The table has two rows of data: "DISC-00000282" with name "2014 Disclosure - John Discloser" and date "3/25/2014 12:18 PM", and "DISC-" with name "2014 Disclosure - John" and date "3/24/2014 2:58 P".

Completing your Outside Activity Disclosure

The Outside Activity SmartForm begins with asking you the type of outside activity you are proposing. Based upon your answers, you will be routed to additional form pages and asked to provide more detail on those activities.

Outside Activity Disclosure

5.1.1 * **Does your outside activity involve any of the following (check all that apply):**

- More than incidental Use of USF System facilities, equipment, or services;
- Supervision of USF System student or employee you also supervise or evaluate as part of your USF job;
- Waiver or assignment of rights to inventions or works, yours or the USF System's;
- Candidacy for or holding public office;
- Being paid or otherwise compensated (for faculty only professional compensated outside activity must be disclosed);
- None of the above; however, this activity could potentially create a conflict of interest or commitment and I would like to disclose it.

Once you have answered all the questions pertaining to your specific situation, the eDisclose system will summarize your disclosure on the **Outside Activity Summary** page. Review this page for accuracy.

Outside Activity Summary

Check these responses for accuracy

Please review the below summary of your **Outside Activity** disclosure for accuracy. If correct, then click on the "Continue" button on the right-hand side tool bar to save your outside activity disclosure within the eDisclose system.

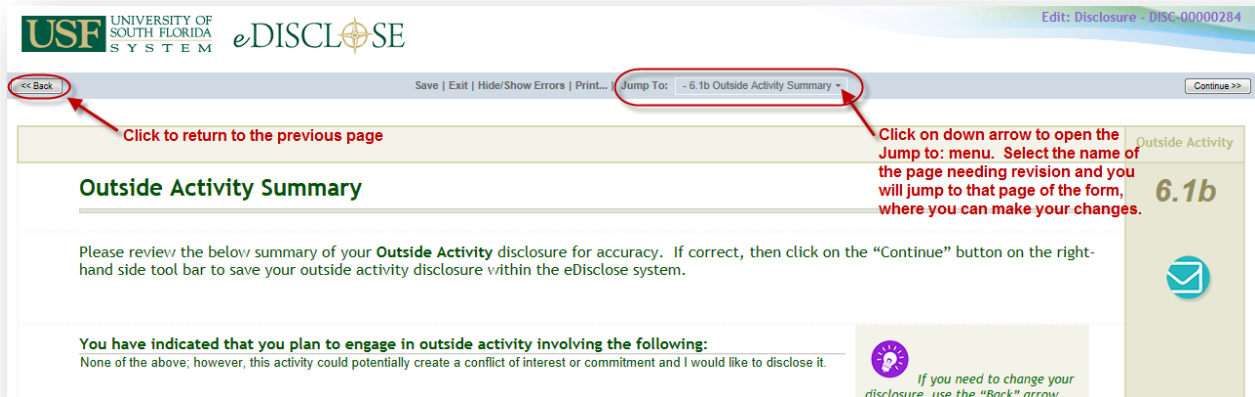
You have indicated that you plan to engage in outside activity involving the following:
None of the above; however, this activity could potentially create a conflict of interest or commitment and I would like to disclose it.

Don't Forget! You are responsible for taking reasonable precautions to ensure that the outside employer or other recipient of your services understands that you are engaging in such outside activity as a private citizen and not as an employee, agent, or spokesperson of the USF System.

If you need to change your disclosure, use the "Back" arrow located at the upper right-hand tool bar to modify your answers.

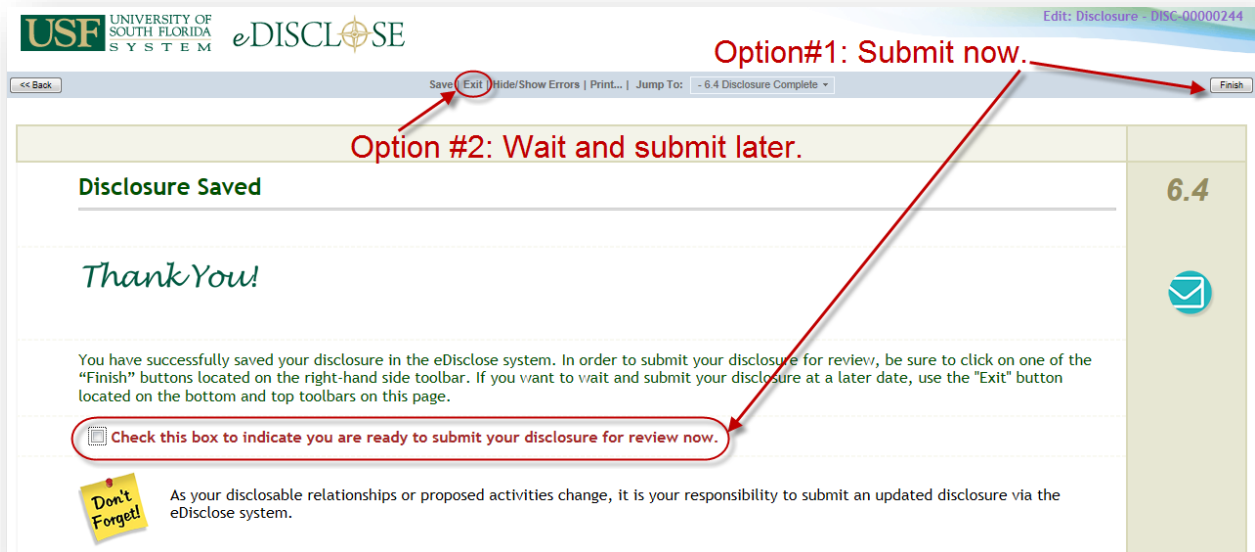
6.1b

If you need to modify your answers, use the **Back** button or the **Jump To:** drop-down menu to navigate to the page of the form needing revision.



If the information presented is correct, then click the **Continue** button, which will bring you to the **Disclosure Saved** page. This page indicates that you have successfully saved, but not submitted, your disclosure in eDisclose. At this point you have one of two options to submit your disclosure:

- Option#1—Submit now by checking the checkbox and then clicking on **Finish** button
- Option #2—Wait and submit later by clicking on **Exit** in the navigation bar.




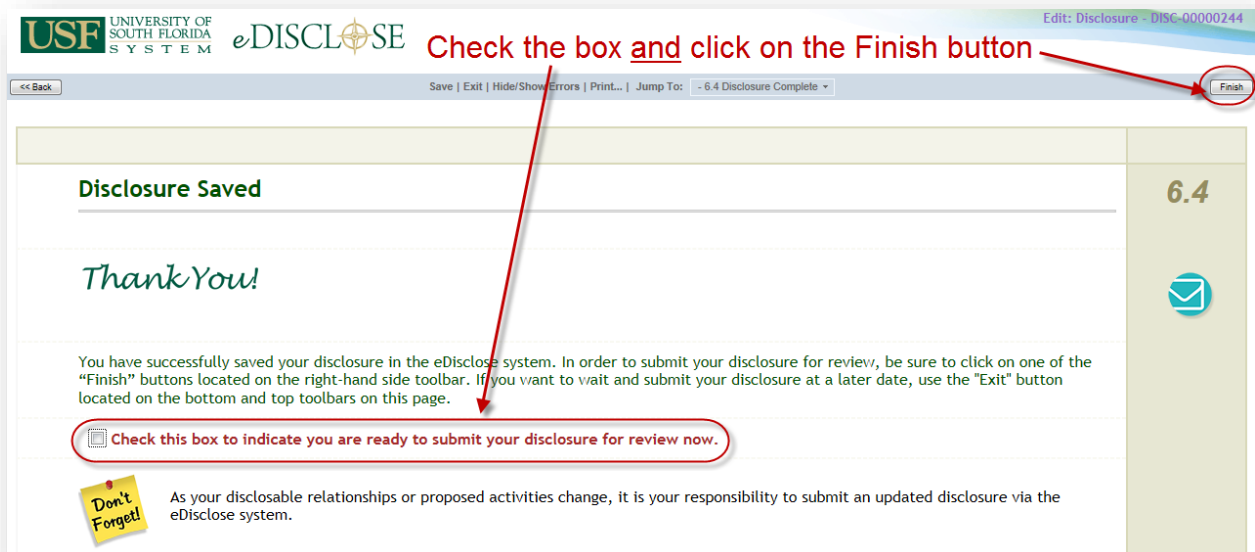
Section Five: Submitting Disclosures

Once you have completed a disclosure, you have one of two submission options.

Option 1: Submit at the time you complete your disclosure.

In order to submit at the time you completed your disclosure, check the checkbox on **Disclosure Saved** page to indicate you are ready to submit your disclosure and then click on the **Finish** button located on the upper-right-hand side of the SmartForm.


 Your disclosure is not submitted until you check the checkbox and then click on the **Finish** button.



USF UNIVERSITY OF SOUTH FLORIDA SYSTEM eDISCLOSE Edit: Disclosure - DISC-00000244


<< Back Save | Exit | Hide/Show Errors | Print... | Jump To: - 6.4 Disclosure Complete - Finish

Disclosure Saved 6.4

Thank You! 

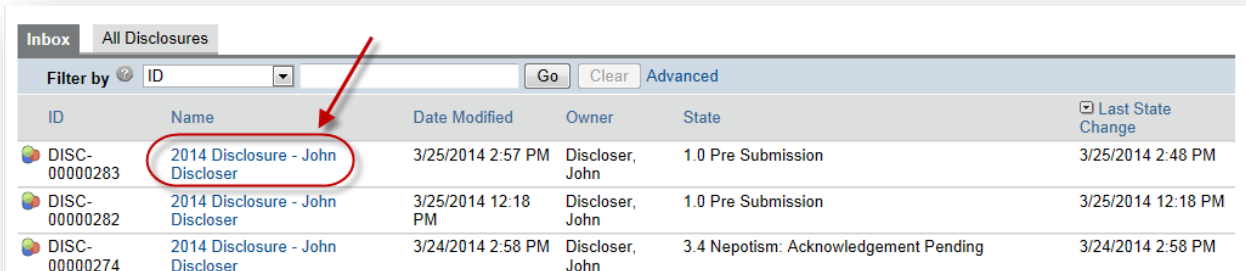
You have successfully saved your disclosure in the eDisclose system. In order to submit your disclosure for review, be sure to click on one of the "Finish" buttons located on the right-hand side toolbar. If you want to wait and submit your disclosure at a later date, use the "Exit" button located on the bottom and top toolbars on this page.

Check this box to indicate you are ready to submit your disclosure for review now.

 As your disclosable relationships or proposed activities change, it is your responsibility to submit an updated disclosure via the eDisclose system.

Option 2: Submit a previously saved disclosure.

On the **Inbox** tab of your Home page, click on the name of the disclosure to open the Disclosure's Workspace.



ID	Name	Date Modified	Owner	State	Last State Change
DISC-0000283	2014 Disclosure - John Discloser	3/25/2014 2:57 PM	Discloser, John	1.0 Pre Submission	3/25/2014 2:48 PM
DISC-0000282	2014 Disclosure - John Discloser	3/25/2014 12:18 PM	Discloser, John	1.0 Pre Submission	3/25/2014 12:18 PM
DISC-0000274	2014 Disclosure - John Discloser	3/24/2014 2:58 PM	Discloser, John	3.4 Nepotism: Acknowledgement Pending	3/24/2014 2:58 PM

Click on the **Submit Disclosure** button located on the left-hand menu of the disclosure's workspace.



USF UNIVERSITY OF SOUTH FLORIDA SYSTEM eDISCLOSE

Welcome **Disclosures**

Disclosures > 2014 Disclosure - John Discloser

Current State

1.0 Pre Submission

Edit Disclosure

Printer Version

Disclosure: (DISC-0000283)

Discloser: John Discloser

History Change Log

My Activities

DISC **Submit Disclosure**

DISC Withdraw Disclosure

This will open the **Submit Disclosure** activity window. Check the checkbox to indicate that the information provided on your FCOE form represents a full and accurate disclosure and click on the **OK** button. If you are not ready to submit your disclosure, click the **Cancel** button to return to the Disclosure Workspace.

Submit Disclosure

* I certify that all information provided in this application represents a full and accurate disclosure.

To submit your Disclosure, click **Ok**.

After submission, you will not be able to edit the form unless a reviewer returns it to you for revisions. Disclosures requiring your attention can be found in your Inbox on your Personal Workspace. You can check the status of this submission at any time via the Disclosure workspace.

If you are not ready to submit your Disclosure, please click **Cancel**.

OK **Cancel**

Once submitted, the Disclosure Workspace will display “Disclosure Submitted” on the **History** tab as well as by whom and when. The History tab will provide you with a step-by-step summary of what happened to your disclosure during every step of the review process. Similarly, the Current State of your disclosure is always presented on the Disclosure Workspace in the red box on the left-hand menu.

In the below FCOE example, John Discloser submitted his disclosure on March 25, 2014, at 3:18 p.m. and it is currently under compliance review for a potential conflicting business relationship.

The screenshot shows the eDISCLOSE interface for a disclosure with ID DISC-00000283. The 'Current State' is '2.0 Business Relationship: Compliance Review'. The 'History' table has the following data:

Activity	Author	Activity Date
Disclosure Submitted	Discloser, John	3/25/2014 3:18 PM

Annotations include a red box around the 'Current State', a red arrow pointing to the 'Disclosure Submitted' row, and a red text box stating 'Indicates "submitted" by whom and when'.

In the below Outside Activity example, John Discloser submitted his disclosure on March 25, 2014, at 4:41 p.m. and it is currently under Supervisor review for his proposed outside activity.

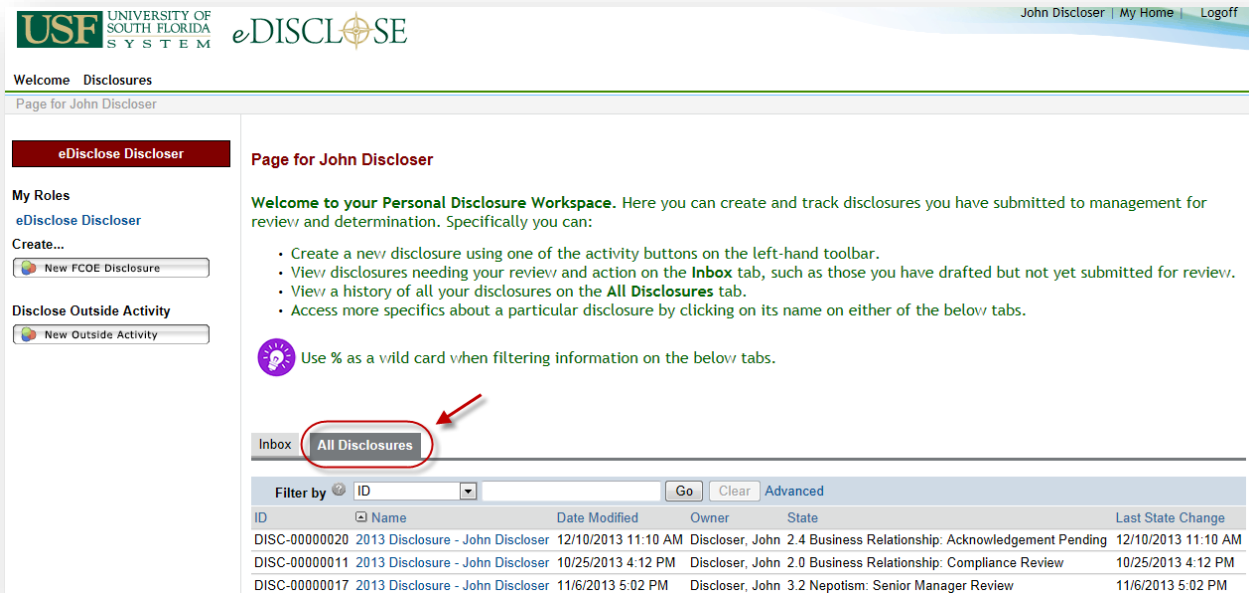
The screenshot shows the eDISCLOSE interface for a disclosure with ID DISC-00000284. The 'Current State' is '4.0 Outside Activities: Supervisor Review'. The 'History' table has the following data:

Activity	Author	Activity Date
Disclosure Submitted	Discloser, John	3/25/2014 4:41 PM

Annotations include a red box around the 'Current State', a red arrow pointing to the 'Disclosure Submitted' row, and a red text box stating 'Indicates "submitted" by whom and when'.

Section Five: Post-Submission Actions

After submitting your disclosure, it will no longer display in your Inbox. Instead, it will display on the **All Disclosures** tab on your Home page. Only disclosures requiring your review and action will be listed in your Inbox.



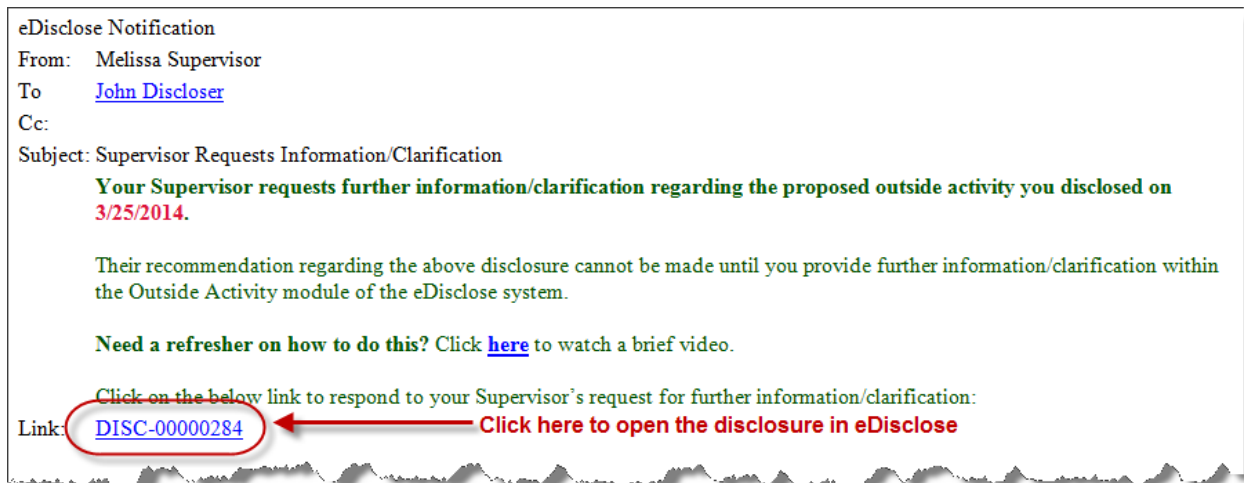
The screenshot shows the eDisclose Discloser interface. The top navigation bar includes the University of South Florida logo, the user name 'John Discloser', and links for 'My Home' and 'Logoff'. The main content area is titled 'Page for John Discloser' and contains a welcome message and instructions. A red circle highlights the 'All Disclosures' tab in the 'Inbox' section, with a red arrow pointing to it. Below the tabs is a table of disclosures with columns for ID, Name, Date Modified, Owner, State, and Last State Change.

ID	Name	Date Modified	Owner	State	Last State Change
DISC-00000020	2013 Disclosure - John Discloser	12/10/2013 11:10 AM	Discloser, John	2.4 Business Relationship: Acknowledgement Pending	12/10/2013 11:10 AM
DISC-00000011	2013 Disclosure - John Discloser	10/25/2013 4:12 PM	Discloser, John	2.0 Business Relationship: Compliance Review	10/25/2013 4:12 PM
DISC-00000017	2013 Disclosure - John Discloser	11/6/2013 5:02 PM	Discloser, John	3.2 Nepotism: Senior Manager Review	11/6/2013 5:02 PM

Responding to Clarification Requests

The institutional official assigned by eDisclose to review your disclosure may request clarifications from you after reviewing your disclosure. When such clarifications are requested, your disclosure will be returned to your Inbox. The eDisclose system will notify you when such a clarification request is needed via an automated email sent to the email on record in your GEMS account established and maintained by Human Resources.

Below is an example of what such an automated email will look like. In this example, your supervisor is asking that you provide more information regarding an outside activity you disclosed in eDisclose on March 25th.



Click on the link provided in the automated email to open the Disclosure Workspace for the disclosure needing your attention, provided you are logged in with your NetID; otherwise you will be prompted to login.

Alternatively, log into eDisclose using your NETID. Then on the **Inbox** tab of your Home Page, click on the name of the disclosure to open the Disclosure's Workspace.

ID	Name	Date Modified	Owner	State	Last State Change
DISC-00000283	2014 Disclosure - John Discloser	3/25/2014 2:57 PM	Discloser, John	1.0 Pre Submission	3/25/2014 2:48 PM
DISC-00000282	2014 Disclosure - John Discloser	3/25/2014 12:18 PM	Discloser, John	1.0 Pre Submission	3/25/2014 12:18 PM
DISC-00000274	2014 Disclosure - John Discloser	3/24/2014 2:58 PM	Discloser, John	3.4 Nepotism: Acknowledgement Pending	3/24/2014 2:58 PM

Once the disclosure's workspace is open, the **History** tab will display a summary of what the Reviewer needs.

The screenshot shows the eDISCLOSE system interface. At the top, it displays the University of South Florida logo and the text "UNIVERSITY OF SOUTH FLORIDA SYSTEM eDISCLOSE". Below this, there are tabs for "Welcome" and "Disclosures". The main content area is titled "Disclosures > 2014 Disclosure - John Discloser". On the left, there is a "Current State" section with a red box indicating "4.3 Outside Activities: Disclosure Response Pending". Below this are buttons for "Edit Disclosure" and "Printer Version". Further down is a "My Activities" section with a red circle around the "Submit Response" button. On the right, there is a "Disclosure: (DISC-00000284)" section with fields for "Discloser: John Discloser" and "Submission Date: 3/25/2014". Below this are tabs for "History" and "Change Log". The "History" tab is active, showing a table with columns "Activity" and "Author". The first row is "Supervisor Request Clarification From Discloser" by "Supervisor, Melissa". The second row is "Is Sam's Clams a USF System Vendor? What if they want you to work on weekdays? We need you in the lab on weekdays." by "Discloser, John". A red circle highlights the second row, and a red arrow points to it with the text "Summary of what the Reviewer needs".

To submit your updated form and/or to provide further details to the Reviewer, select the **Submit Response** activity to open the **Submit Response** window. Type your response in the text box provided and then click **OK** to submit your response to the reviewer. If you are not ready to submit your response, click on the **Cancel** button to return to the disclosure's workspace.

The screenshot shows the "Submit Response" dialog box. It has a title bar "Submit Response" and a dashed border. Inside, there is a text area with the instruction "To provide further details regarding this disclosure please enter your response below:". Below this is a "Response:" label and a text input field containing "The execution date of the contract was 11/02/2013.". A red arrow points to the input field with the text "Respond here.". Below the input field is the instruction "Click the OK button to confirm.". At the bottom right, there are two buttons: "OK" and "Cancel". A red arrow points to the "OK" button, which is circled in red.



You can only edit your disclosure form using the **Edit Disclosure** button on the left-side of the Disclosure Workspace *before* submitting your response.

After you have submitted your response to the Reviewer, the Disclosure Workspace will display “Response Submitted” on the **History** tab as well as by whom and when. The History tab will provide you with a step-by-step summary of what happened to your disclosure during every step of the review process. Similarly, the Current State of your disclosure is always presented on the Disclosure Workspace in the red box on the left-hand menu.

Current State

4.0 Outside Activities: Supervisor Review

View Disclosure

Printer Version

My Activities

DISC Withdraw Disclosure

Disclosure: (DISC-0000284)

Discloser: John Discloser

History Change Log

Activity

DISC Response Submitted

According to the Vendor Lookup Tool in eDisclose, Sam's Clams is not weekdays.

SUP Supervisor Request Clarification From Discloser

Is Sam's Clams a USF System Vendor? What if they want you to work

DISC Disclosure Submitted

Acknowledging the Review Decision

Once review of your disclosure is complete, the eDisclose system will send you an automated email notifying you need to acknowledge the institution's determination in eDisclose. Below is an example of such a notification for an outside activity.


eDisclose Notification
From: Paul SManager
To: John Discloser
Cc: Melissa Supervisor , Jennifer Manager
Subject: Outside Activity Acknowledgement Required

A determination has been made regarding the proposed outside activity you disclosed on 3/20/2014.

The review of the above disclosure will not be considered complete until you acknowledge receipt of this determination within the Outside Activity module of the eDisclose system.

Need a refresher on how to do this? Click [here](#) to watch a brief video.

Click on the below link to view and acknowledge receipt of this determination:

Link: [DISC-00000275](#)  **Click here to open the disclosure.**

Click on to the link provided in the email to automatically open the workspace for the disclosure needing your acknowledgement.



If you are not logged in with your NetID, you will first be prompted to login and then you need to open the disclosure's workspace by clicking on its name on the Inbox tab.

On the disclosure's workspace, choose the **Acknowledge** activity.

Current State

4.4 Outside Activities: Acknowledgement Pending

View Disclosure

Printer Version

My Activities

DISC Acknowledge

DISC Withdraw Disclosure

Disclosure: (DISC-00000275)

Discloser: John Discloser

History Change Log

Activity

SMGT Senior Manager OA Determination Complete: *Approved with Conditions*

Conditions XYZ

MGT Manager OA Recommendation Complete: *Approved with Conditions*

Apply conditions XYZ.

SUP Supervisor OA Recommendation Complete: *Approved with Conditions*

Yes conditions XYZ will be applied.

This will open the **Acknowledge** activity window.

Acknowledge

By checking the box below, you are affirming you have read the review of your disclosure and are acknowledging the decision made by the University.

Outside Activity Review Determination:
Approved with Conditions

Conditions/Explanation:
Conditions XYZ

Check here I have read and acknowledge the decision made regarding my disclosure.

OK Cancel

Check the checkbox and click the **OK** button. If you are not ready to acknowledge the review decision, click on the **Cancel** button to return to the disclosure's workspace.

Once you have successfully acknowledged the review decision, the Disclosure Workspace displays “Acknowledged” on the **History** tab as well as by whom and when. The History tab provides a step-by-step summary of the review of your disclosure. Similarly, the Current State of your disclosure is presented on the Disclosure Workspace in the red box on the left-hand menu as “Review Complete” .

In the below example, outside activity disclosure #275 was “Approved with Conditions” by the Senior Manager; John Discloser has acknowledged this review decision; and no further action within eDisclose because according to the Current State the review is complete.



Remember, you can access and view completed disclosures at any time from the **All Disclosures** tab on your Home Page.

ID	Name	Date Modified	Owner	State
DISC-0000275	2014 Disclosure - John Discloser	3/26/2014 4:56 PM	Discloser, John	5.0 Review Complete

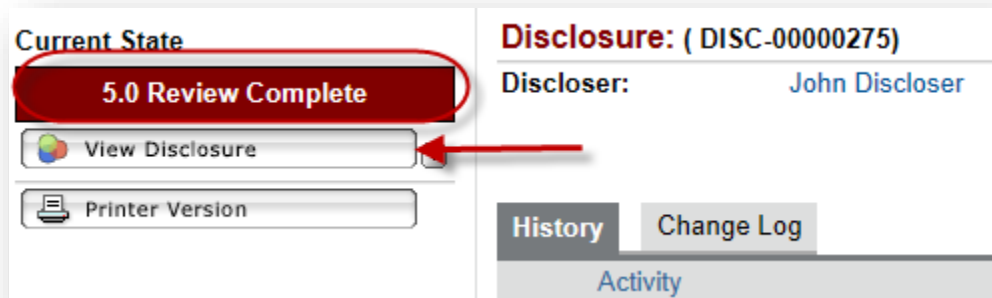
Editing Your Disclosures

You can edit your disclosure at any time prior to its submission for review or when your disclosure has been returned to you because the reviewer has requested changes or clarification. This means you can only edit disclosures in the **Pre Submission** or **Response Pending** states. These are always displayed on the left-hand menu of the disclosure's workspace, see below example.

Open the disclosure's workspace, click on the **Edit Disclosure** button to open your Disclosure form, edit it, and save your changes.



Remember, a disclosure in the "Review Complete" state can no longer be edited and can only be viewed using the View Disclosure button on the left-hand menu of the disclosure's workspace.

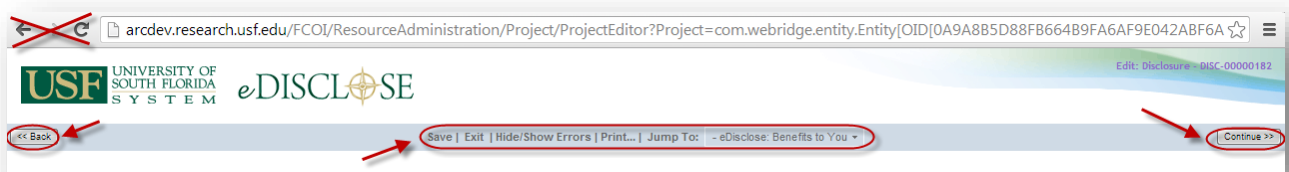


Section Six: Addendum

Working with SmartForms

All disclosures in eDisclose use SmartForms, which only present those questions relevant to your disclosure. It is important that you respond to each question displayed on the SmartForms. Required fields are marked with a red asterisk *.

You can answer text questions by typing directly into the text box or by pasting in text from other documents. The **Add** Function allows you to attach relevant documents or select your answer from a pre-populated listed depending on the question. Navigation controls are located in the navigation bar at the top and bottom of each page. Use the **Continue** and **Back** buttons to move to the next or last-viewed screen, respectively. Be sure to use the SmartForm navigation controls instead of the controls in the browser bar (e.g. Internet, Explorer, Firefox, Chrome, Safari, Opera).



Save your disclosure by clicking the **Save** or **Continue** buttons.



The **Back** button does not save changes. After you enter or edit data on a screen, click **Save** before going **Back**!

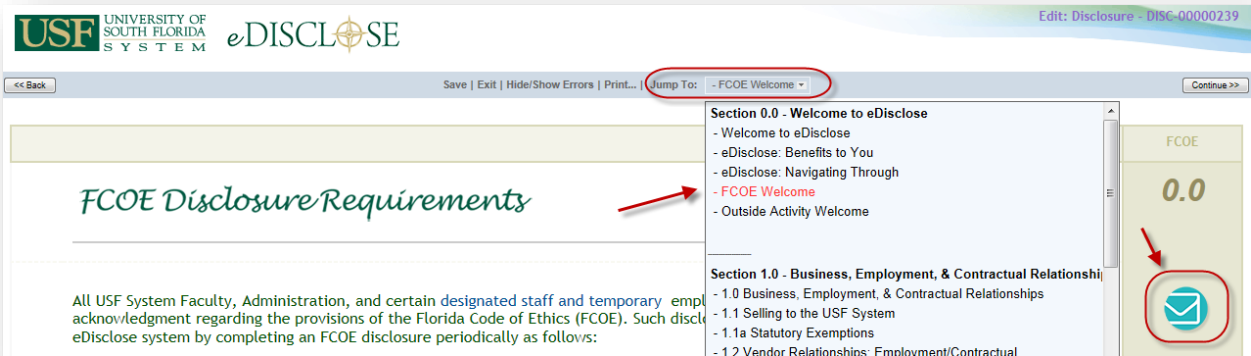
Use **Exit** to close the disclosure and return to that disclosure's workspace.



Always **Save** before exiting!

Each section and question is numbered for easy navigation and reference. Numbering is consistent through all Smartforms; however, remember that only the relevant questions for each specific disclosure form are displayed.

Once new or revised data on a page has been saved, you can navigate directly to the other sections and questions by using the **Jump To:** drop-down menu. The title of the displayed page will be **red**. Disclosure page of the forms not relevant to your disclosure type will appear in gray in the Jump to Menu.



WARNING: After entering or editing data on a screen, click **Save** before using **Jump To:!** The **Jump To:** menu does not save.

Placed throughout the Smartforms in the right-hand column of each page of the form is the **Email** button represented by the below blue-and-white envelope icon pictured below. Click on this button to send an email requesting compliance advice or technical support when you need it.

