Prepare/Update an Outside Interest Disclosure as a Proxy

A designated Department Assistant (proxy) can update disclosures on behalf of individuals in their division, department or unit (as applicable). As a Department Assistant, you can complete most sections of the disclosure record; however, only the Discloser can certify having completed the SFI Training (for Annual Disclosures) and Sign/Submit their disclosure record.

This document is divided into the following sections:

- Home Workspace (Field Descriptions)
- Disclosure Workspace (Field Descriptions)
- Update/Create Disclosures
- Re-open a Disclosure Record for Editing

The following sections provide descriptions of the Home Workspace and the Disclosure Workspace. Use them as a reference when completing the Update/Create or Re-open procedures at the end.

Home Workspace

Upon logging into M-Inform, your Inbox will not contain any records. If desired, use the Move to Inbox activity in the Disclosure Workspace to move individual records into your Inbox.

<table>
<thead>
<tr>
<th>Letter</th>
<th>Link/Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Add/Update disclosures as proxy</td>
<td>Click to create an Update Disclosure record for a Discloser (see letter “F”). Once an update has been created by a proxy, it will automatically display in their Inbox.</td>
</tr>
<tr>
<td>B</td>
<td>Inbox tab</td>
<td>List of disclosure records you are currently working on. To add a record to the list, click the Move to Inbox activity in the Disclosure Workspace.</td>
</tr>
<tr>
<td>C</td>
<td>Disclosure Updates In Progress tab</td>
<td>Lists all disclosure records that have been created for/by Disclosers in your department for whom you have permission to view. Only records in a Draft state are available to open and edit.</td>
</tr>
<tr>
<td>D</td>
<td>Completed Disclosure Updates</td>
<td>Lists completed disclosure records that have been created for/by Disclosers in your department for whom you have permission to view. Only records in a Review Complete state display.</td>
</tr>
<tr>
<td>E</td>
<td>Annual Disclosure Record</td>
<td>Contains the previous fiscal year’s outside interest disclosures for an individual to be updated for the current fiscal year.</td>
</tr>
</tbody>
</table>

Definitions:
Disclosure – A report of whether or not you have an outside interest, activity, or relationship with an external organization that relates to your institutional responsibilities.
Disclosure Record – A “set” of one or more disclosures.
### Department Assistants

**Prepare/Update Disclosures as a Proxy**

**Step-by-Step Procedure**

<table>
<thead>
<tr>
<th>Letter</th>
<th>Section/Link/Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Edit Disclosures</td>
<td>Click to open the disclosure record and modify the existing outside interests or add new ones. See the <a href="#">M-Inform Discloser procedure</a> for instructions on completing the disclosure form.</td>
</tr>
</tbody>
</table>
| B      | Activities       | **Post a Comment** – Click to post a comment and/or attach a document in the Disclosure workspace. You can also choose to send an associated email notification to specified individuals.  
**Move to Inbox** – Click to move the disclosure record to your Inbox tab. Once the record has been moved to your Inbox, the **Remove from Inbox** activity replaces it.  
**Alert Discloser to Sign** – Click to send an email notification to the Discloser that their disclosure record is ready to be signed. You may also include optional Comments with this notification (e.g., Please complete the SFI Training, review your disclosures, and sign your Annual Disclosure Record). |
| C      | History tab      | A detailed log of activities (and associated comments) performed on the record. |
| D      | My Disclosures list | A list of the Discloser's current outside interests. |
| E      | Activity History list | A high-level log of activities (and associated comments) performed on the certification. |

**Disclosure Certification Workspace**

| F      | Update Disclosure Record | The type of record created to add/update outside interests if the Annual Disclosure has been approved for the current fiscal year. |
| G      | My Home | Click to return to your Home Workspace. |
| H      | Logoff | Click to logoff of M-Inform. |

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### Department Assistants
#### Prepare/Update Disclosures as a Proxy
##### Step-by-Step Procedure

<table>
<thead>
<tr>
<th>F</th>
<th>State / Type / ID#</th>
<th>Current State of the disclosure record (e.g., Draft, Department Review, etc.), the Type of record (e.g., Annual Disclosure, Disclosure Update), and the record’s ID#.</th>
</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>Status meter</td>
<td>Displays a visual image of progress of a disclosure.</td>
</tr>
</tbody>
</table>

**Update Disclosures (when a disclosure record is “in progress”)**

If the Discloser has a disclosure record (Annual or Update) in progress, it appears on the **Disclosure Updates In Progress** tab. Only those records in a Draft State can directly accessed and edited.

1. Click the **Name** of the disclosure record you wish to update from the **Disclosure Updates in Progress** tab. The Disclosure Workspace displays.
2. Click **Edit Disclosures** and modify the disclosure record, as necessary.
3. Click the **Alert Discloser to Sign** activity, enter (optional) **Comments**, and then click **OK**.

**Create an Update Disclosure Record as Proxy**

If the Discloser does not have an Annual or Update Disclosure listed on the **Disclosure Updates In Progress** tab, you can create one on their behalf.

1. Click the **Add/Update Disclosures as Proxy** button.
2. Enter the last name or the uniqname of the discloser. Select their name from the list of matching values that appears.
3. Confirm the correct Discloser’s name displays, and then click **OK**.

**Note:** The Update Disclosure record is created and displays on your **Inbox** tab.

4. From the Inbox tab, click the **Name** of the record to open the Disclosure Workspace.
5. Click **Edit Disclosures** and modify the disclosure record, as necessary.

**Note:** See the [M-Inform Discloser procedure](#) for instructions on updating/removing disclosures.

6. Click the **Alert Discloser to Sign** activity, enter optional **Comments**, and then click **OK**.

**Re-open a Disclosure Record for Editing**

After a discloser signs and submits their disclosure record, it moves to a review State (e.g., Department Review or COI Review). To make updates, you must move it back to a Draft State using the “Reopen” activity. This activity is available only when a record is in a review State.

After applying the edits, use the **Alert Discloser to Sign** activity to notify the discloser to re-sign and submit their disclosure record for review.

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1. Click the Name of the disclosure record you wish to update from the Disclosure Updates In Progress tab. The Disclosure Workspace displays.

2. Select Reopen for Edits from the Activities box.

3. Enter the reason you are returning the record to a Draft State (i.e., re-opening it).
   
   **Note:** The reason displays in the Activity History list in the Disclosure Workspace.

4. Click OK to return to the Disclosure Workspace.

5. Follow the Update Disclosure steps to access the disclosure record to apply the edits.