



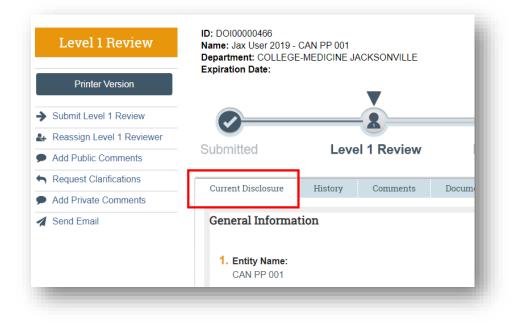
UFOLIO QUICKSTART REVIEWER GUIDE

The following instructions will walk you the basics of how to use UFOLIO as a Reviewer.

1. Click on the **disclosure** you wish to review.

| DOIs | | | | |
|-------------|----------------------------|---------------------------------------|-------------------|----------------------------------|
| Filter by 🔞 | ID | Enter text to search for | | Q + Add Filter × Clear All |
| ID | Name | Disclosure Type | Status | Department |
| DOI00000448 | Jax Chair 2019 - ridfdf | FCOE and Other Financial Interests | Pre Submission | COLLEGE-MEDICINE JACKSONVILLE |
| 1 items | | | | ✓ page 1 of 1 ▶ |

2. You are now in Disclosure Workspace. The information for the disclosure is defaulted as your first view, otherwise called the "**Current Disclosure**" tab. Scroll down the page to review all of the information.





3. You may also see other pertinent information about the disclosure by clicking on any of the **tabs**. The Disclosure Portfolio tab is of special note. It will let you access and view all disclosures that a person has, if you have the corresponding permissions.

| epartment: COLLEGE spiration Date: | | NONSONVILLE | | | | |
|---------------------------------------|---------|-------------|-----------|----------|----------|----------------------|
| Ø —— | | 2 | | 181 | | |
| Submitted | Leve | el 1 Review | Level | 2 Review | Revie | ew Complete |
| Current Disclosure | History | Comments | Documents | Reviews | Renewals | Disclosure Portfolio |

4. After reviewing all pertinent information, if you need clarification from the discloser, click **Request Clarifications** from the left-aligned activities menu. Then, select **Discloser** and leave appropriate comments and questions. They will be messaged that you have requested clarifications.

| Level 1 Review | O Level 1 reviewer | |
|---------------------------|------------------------------------|--|
| Printer Version | O Level 2 reviewer <u>Clear</u> | |
| Submit Level 1 Review | 2. * Comments: Fill in comments | |
| Reassign Level 1 Reviewer | | |
| Add Public Comments | | |
| Request Clarifications | | |
| Add Private Comments | | |
| Send Email | | |

5. You may also leave public and private comments, as well as send an email. Public comments are visible to everyone, as are emails, so please be mindful of this. Sending emails also allows the recipient to view the disclosure. Private comments are only visible to users in the review chain, such as a Level 2 reviewer.

| Level 1 Review | | | | |
|----------------|---------------------------|---|--|--|
| | Printer Version | | | |
| > | Submit Level 1 Review | | | |
| 4 | Reassign Level 1 Reviewer | r | | |
| | Add Public Comments | | | |
| • | Request Clarifications | | | |
| • | Add Private Comments | | | |
| 1 | Send Email | | | |

6. When you are ready to submit your review (approve or disapprove), click the Submit Level 1 Review activity on the left-aligned activities menu. Then, either approve or disapprove. If you disapprove, you must enter comments. Select OK when you are ready to submit your review.

| Level 1 Review | 1. * Determination: O Approved O Disapproved |
|---------------------------|--|
| View Disclosures | <u>Clear</u> 2. Comments: |
| Printer Version | Must leave disapproval reason/comments if disapproved. |
| View Differences | |
| Submit Level 1 Review | |
| Add Public Comments | 3. Attachments: |
| Request Clarifications | + Add Name Description |
| Add Private Comments | There are no items to display |
| Reassign Level 1 Reviewer | |
| Send Email | |

7. You may also reassign another reviewer. For instance, if you are traveling, you may want to reassign your review. To do so, click **Reassign Level 1 Reviewer**.

Then, either type or select the new reviewer and click ok.

NOTE: The new reviewer will have to confirm the reassignment.

| Level 1 Review | |
|---------------------------|-------------------------------|
| Printer Version | |
| Submit Level 1 Review | 1. Existing Level 1 Reviewer: |
| Reassign Level 1 Reviewer | Jax Chair |
| dd Public Comments | |
| Request Clarifications | * New Level 1 Reviewer: |
| Add Private Comments | |
| Send Email | |