

Target Audience-- This guide is useful to supervisors who have received an email requesting a review of their employees' updated COI disclosure.

Purpose – Disclosures that have items exceeding the minimum criteria, as determined by University of Tennessee policy, require review by the employee's supervisor to determine if the disclosure represents a financial or commitment conflict with the employee's job duties. This guide lists the steps supervisors must complete when reviewing these certifications.

How to use – The guide will list labels as shown in the application in bold. A bold and italicized label in the instructions is your indication to make that selection.

1. The supervisor will receive an email with the subject line **General certification for Name (CERT#) has been routed for your review.**

- Supervisors will receive an email when they need to review an employee's disclosure
- Click the link in the notification "[General certification for Patricia Page \(CERT00000389\)](#)"

To:	Jeanne Hermann-Petrin
Link:	<a href="#">General certification for Patricia Page (CERT00000389)</a>

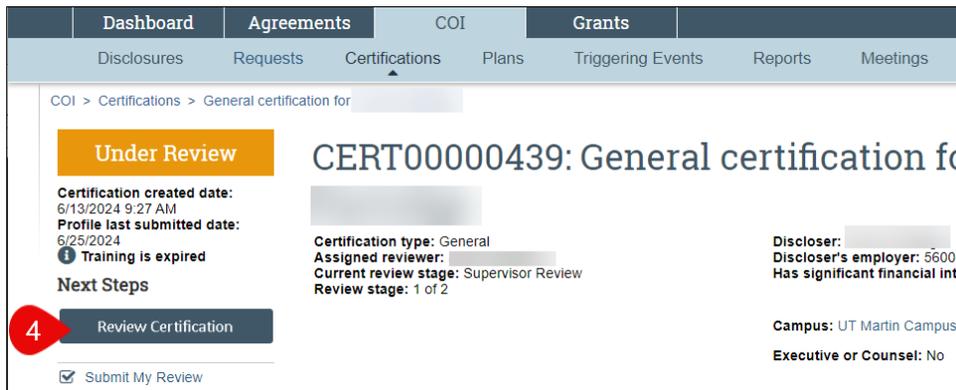
- When using the link within the email, you can skip to step 4.
- You can also access the Huron COI Module at <https://coi.dash.tennessee.edu>
- Opens to Huron Dashboard and your **My Inbox** tab.

2. Click **Dashboard**.

3. Click the **General Certification for ...** link to start the review process.



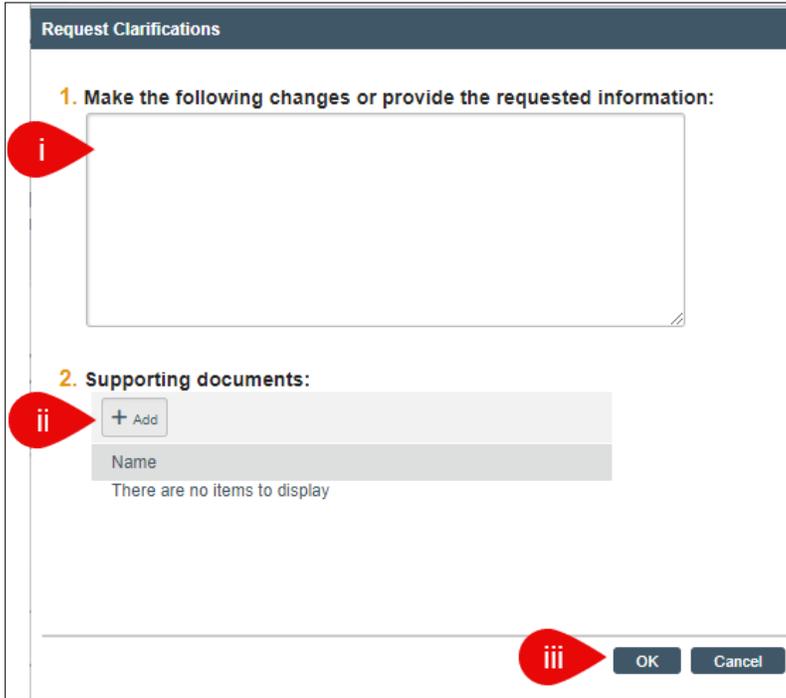
4. Click the **Review Certification** button.



- a. Review the disclosure information provided.
- b. Optionally, reviewers can check the box next to **Above section has been reviewed** to track the review process.

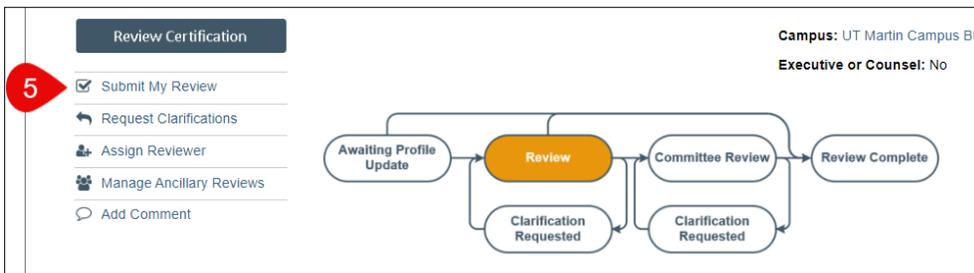


- c. Click the **Exit** button located on the bottom right after reviewing all sections.
- d. Click the **Request Clarifications** activity from the workspace on the left of the screen **only** if you need the discloser to provide additional information.



- i. Enter your comments/instructions to the discloser.
- ii. Add any supporting documentation by clicking the **+Add** button.
- iii. Click **OK** to return the certificate to the discloser for a response.

- 5. Click the **Submit My Review** activity from the workspace if you have the information needed to process the disclosure to the next review stage.



Note: Help Text is available to provide more information with the help text bubbles. 

**Submit My Review**

 Submitting this review will move the certification to the next stage of the review process.

**1. \* Do you recommend additional action, such as assigning an ancillary review or assigning this certification to a management plan?** 

**6**  Yes  No [Clear](#)

**2. \* Provide additional information below to support your review:**  
Note: If you selected No above, you are indicating that the disclosure does not represent a conflict of interest or conflict of commitment. If you selected Yes, include statements describing the potential conflict of interest and/or commitment. 

**7**

**3. Supporting documents:**

**8**

Name	Description
There are no items to display	

**9**

6. Based on your decision, select **Yes** or **No** to the question **Do you recommend ...**
7. Explain your recommendation in the **textbox** provided.
8. Upload any documents related to your review **Under Supporting documents.**
9. Click **OK** when finished.

**Video:** [Disclosure Profile – Supervisor Review](#) (6:31)