

How to Forward Your Annual COI/COC Disclosure in



Forwarding Your Annual Disclosures for Review

Note: When a designated Annual Disclosure reviewer (DAD's) completes their own Annual Disclosure the "Disclosure Actions" will not be available.



- This is intentional and ensures that you are unable to approve your own Annual Disclosure.

You **MUST** complete your Annual Disclosure and Certification steps before forwarding for review.

*Please Reference the "How to Enter a COI in StreamLyne2020" Documentation for instructions.

- Once completed Navigate to the *Ad Hoc Recipients* section
- Under Person Requests you will be adding a person to approve your Annual Disclosure.
- Select APPROVE for Action Requested Drop-Down
- Click magnify glass to search for person

- Enter Last Name of your Dept. Chair or Director & Click Search

- Click **return value** on record displayed



- Once the person is returned select **Add** and it will show as an additional line in Person Requests.
- To forward click **Send AdHoc** at the bottom of the page so that your Dept. Chair or Director can approve.