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

 Ad Hoc Recipients 			
Ad Hoc Recipients			•
Person Requests:			_
* Action Requested	* Person		Actions
APPROVE V	Q		Add
Ad Hoc Group Requests:			
* Action Requested	* Namespace Code	* Name	Actions
APPROVE V		Q	Add

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

Person Lookup					
Person Id:	9	Last Name:	Dept Chair or Director		
First Name:		User Name:			
Email Address:		Office Phone:			
Active:	● Yes ○ No ○ Both	Home Unit:		9	
Campus Code:	Q 🔳				

• 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.

1

