

How to Forward Your Annual COI/COC Disclosure in



Forwarding Your Annual Disclosure for Review

When a designated Annual Disclosure reviewer (DA) completes their own Annual Disclosure the “Disclosure Actions” tab in the left-hand navigation list is not available.



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

Instead, you will need to forward your completed Annual Disclosure to your Department Chair or Director via an Ad-Hoc Approval.

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

**Please Reference the “How to Enter an Annual COI/COC Disclosure in Streamlyne” Documentation for instructions.*

Once your Annual Disclosure is completed and **after you submit** your Annual Disclosure, **re-open** the Disclosure you just submitted.

You can either open the Annual Disclosure from your Action List or from the email generated by Streamlyne when you submitted the Annual Disclosure.

Once opened, you will be working on the Disclosure tab in the left-hand navigation in the Ad Hoc Recipients panel.

Ad Hoc Recipients panel instructions

1. Navigate to the Ad Hoc Recipients panel.
Under Person Requests you will be adding a person to approve your Annual Disclosure.
2. Select APPROVE for Action Requested Drop-Down.
3. Click the **magnifying glass** to search for a person – your department chair or head. This opens the Person Lookup screen.
 - a. Enter Last Name of your Department Chair or Director & Click Search

- b. Click **return value** on record displayed

4. Once the person is returned select **Add** and it will show as an additional line in Person Requests.

Sending the Ad Hoc Approval

To forward the approval to your Department Chair or Director, scroll to the bottom of the screen and click [Send AdHoc](#) at the bottom of the page.

Final Step

Check the Route Log panel to ensure you see your Department Chair or Director in the Pending Action Requests.

Actions Taken					
Action	Taken By	For Delegator	Time/Date	Annotation	
show	SAVED		03:22 PM 01/05/2022		
show	COMPLETED		03:22 PM 01/05/2022	Disclosure has been certified and submitted.	
show	RECALL		10:41 AM 01/06/2022	recalled document. Recall reason - Didn't add Dept Approver	
show	COMPLETED		11:02 AM 01/06/2022	Disclosure has been certified and submitted.	

Pending Action Requests					
Action	Requested Of	Time/Date	Annotation		
show	IN ACTION LIST APPROVE	Dept Chair Name will appear here	11:16 AM 01/06/2022	Ad Hoc Routed by [redacted]	
show	IN ACTION LIST APPROVE	[redacted]	11:02 AM 01/06/2022	KC-COIDISCLOSURE COI Dept Admin Y 06	

By following these steps, an email is sent to your Department Chair or Head and your Annual Disclosure will appear in their Action List as an Approval needed item.

The person who is approving your Annual Disclosure can then follow the instructions in the Reviewer and Approvers guide to approve your disclosure.