Edit and Submit a Certification

WORK INSTRUCTIONS:

1. Log into the Click Portal and click on the SPO Tasks tab in My Inbox.

2. Click the Annual Disclosure Certification item in the Draft state. If there is more than one, open the one with the most recent date.

3. You will be taken to the Certification Workspace. Click the Edit button.

4. Review the information on the first page of the SmartForms, Annual Certification for {Your Name}: Institutional Responsibilities. Update fields as necessary, being sure to complete all of the required fields.

   - Required information fields are marked with an asterisk (*)
   - Click the Help icon ( ) for more information about a question or field

5. Click the Continue button at either the top or bottom-right of the form.

6. Review the information on the second page of the SmartForms, Annual Certification for {Your Name}: Training and Education Information. This information will be pre-populated.

7. Click the Continue button at either the top or bottom-right of the form.

8. Review the Investigator’s Disclosure Statement, and then indicate whether or not there are any outside organizations or companies with which you or an immediate family member have a relationship.

9. Click the Continue button at either the top or bottom-right of the form.

   - If you have indicated a relationship with an organization or company, you will be taken to the Annual Certification for {Your Name}: Disclosure Details page.

     1. The Disclosures Under Review section will list any previous Disclosures that are still undergoing the review process. If you wish to open one, click the View button. These Disclosures cannot be edited.
2. The **Previously Reviewed Disclosures** section will list prior **Disclosures** that have undergone the review process. To update an existing **Disclosure** with changes, click the **Modify** button and confirm that you wish to edit it. Make and **Save** any changes to the **Disclosure**.

3. The **Add Disclosure** button allows you to create a new **Disclosure**. Click the button and then complete all of the **SmartForms** with the relevant information regarding your relationship to the identified organization or company.

10. Click the **Continue** button at either the top or bottom-right of the **Annual Certification for {Your Name}: Disclosure Details** page.

11. Review the listing of all of your **Disclosures** on the **Annual Certification for {Your Name}: Assurance and Certification** page.

   - To save your disclosure certification for completion at a later time: **Do not** check the confirmation box. Click the Exit button at either the top or bottom of the form to return to the Certification Workspace.

   - To finalize and submit your disclosure certification for review: **Do** check the confirmation box and click the Finish button at either the top or bottom-right of the form.

12. When all of the required fields have been completed, click the **Finish** button in the footer of the last **SmartForm** page to be redirected to the Certification Workspace.

   Your certification has not yet been submitted for review.

13. Click **Submit Disclosures**, located under **My Current Actions** on the left side of the Certification Workspace.

14. Read the **Disclosure Assurance and Certification** statement, and then place a checkmark in the box below it. Click **OK** to submit the disclosure for review.

   - **If the submission is successful**, the page will refresh and the certification will transition from the **Draft** state to the **Administrative Review** state.

   - **The certification can be removed from review** by clicking **Return COI Certification to Submitter** on the left. This action will discontinue the review of the certification, and will allow the COI Discloser to make updates.