



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.*