Navigation and Basic Tasks  - updated 02-17-21

My Inbox

When you first log in, you will be on the “My Inbox” page. For more details regarding the “My Inbox” page, see the “My Inbox” user guide.

Examples of certification types you might see in your In Box:

- **Research Initiated Certification (FCOI Only)**
  New certifications generated by Sponsored Project Administration because award has been received or a proposal is being sent to a sponsor

- **Annual Disclosure Certification (FCOI and COI/COC)**
  A required annual certification is due

- **Disclosure Update (FCOI and COI/COC)**
  A certification update that the user has started but has not yet submitted

For more details regarding the “My Inbox” page, see the “My Inbox” user guide.

**TIP** - Review the “State” of certifications in My Inbox (see #6 in the screen print above). The state gives a clue as to what to do next. For example, “Draft” means you haven’t submitted the certification. You can finish and submit it for review.
The Structure of a Certification

A certification may not contain any disclosures, or it can contain one to many disclosures. The certification is the “wrapper” around any reportable disclosure.

When asked to submit a certification, the SmartForms start out with questions related to the certification. Then the smartform asks for all disclosure information (if any), and ends with the final certification smartform questions.

Any new certification will clone all previously reported information so only new disclosure additions or updates will need to be made.

Opening a Certification

1. From My Inbox, click the certification name.

2. The certification workspace opens.

TIP - From the certification workspace, click the History tab. The history tab lists all activity taken on a certification including any comments, attachments, or correspondence added.
Find a Previous Certification

1. Click the “My Disclosures” activity

The Disclosures tab shows details for each disclosure, including when it was last updated. These entries are not editable here. They are only editable from within a certification.

2. Click the Certifications tab.

There are a couple ways to find the certification you are looking for:

a. Each column header can be clicked to sort by that column. “Status” is a common column that will help to find any in DRAFT that need to be completed and submitted.

b. The “Filter by” can be used to filter the list. The drop down allows you to choose the column you wish to filter. The “+Add Filter” allows you to add a second or third filter.