

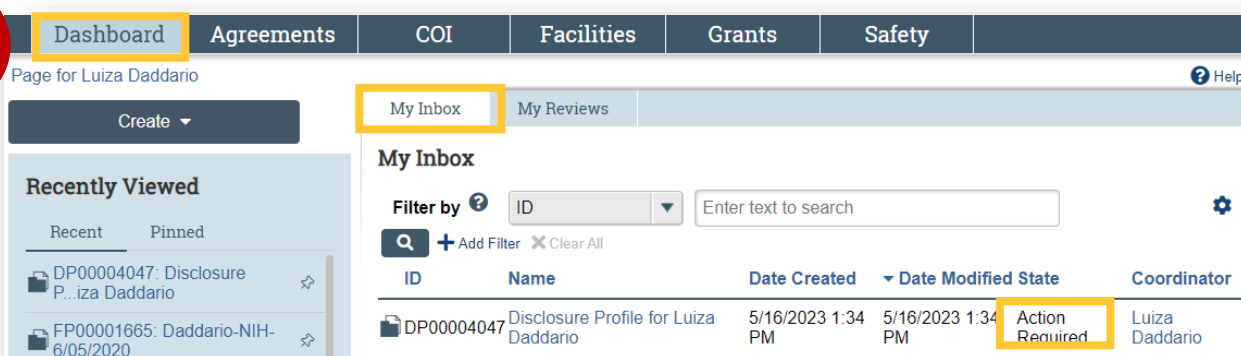
Navigating to the COI Disclosure Workspace

As reviewers, you'll need to use RAMP COI for submitting your COI disclosure and for reviewing COI disclosures for others. This guide was designed to assist you in navigating between the two different workspaces in RAMP COI.

STEP 1: Enter RAMP COI

There are **two** methods of accessing your COI disclosure profile. Upon entering RAMP COI, you'll be brought to your **COI Dashboard**. Notice two tabs within your Dashboard, select the "My Inbox" tab.

1

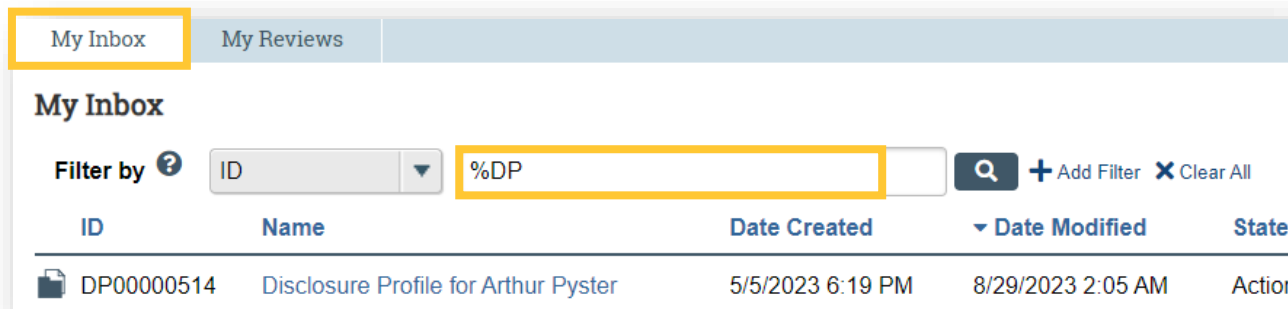


ID	Name	Date Created	Date Modified	State	Coordinator
DP00004047	Disclosure Profile for Luiz Daddario	5/16/2023 1:34 PM	5/16/2023 1:34 PM	Action Required	Luiza Daddario

Notice the Disclosure Profile is in the Action Required state. Within the "My Inbox" tab, you will be able to access your disclosure profile. Access the disclosure profile via the link in the name column.

ID	Name	Date Created
DP00004047	Disclosure Profile for Luiz Daddario	5/16/2023 1:34 PM

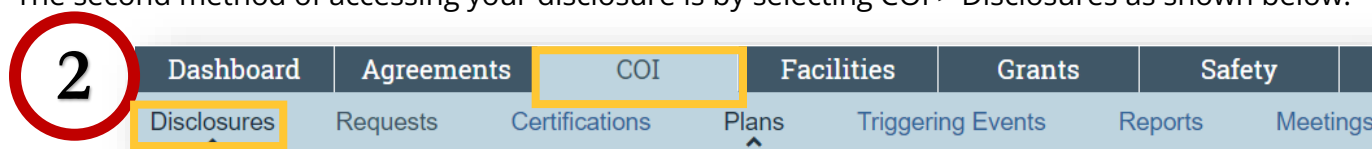
You can use the drop-down menu and text field to further filter your inbox. Use the % when only partial information is accessible.



ID	Name	Date Created	Date Modified	State
DP00000514	Disclosure Profile for Arthur Pyster	5/5/2023 6:19 PM	8/29/2023 2:05 AM	Action



The second method of accessing your disclosure is by selecting COI > Disclosures as shown below.



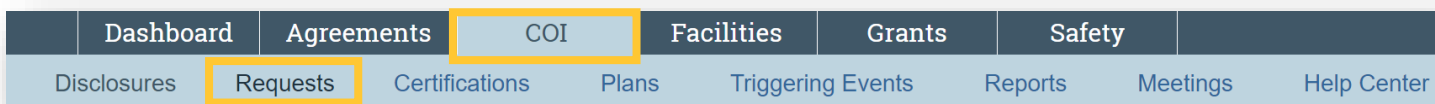
Both methods of access will lead you to the Disclosure Profile workspace. A complete guide can be found in MasonLEAPS within the RAMP COI Training Curriculum (Disclosers).

Navigating to the Pre-Approval Request Workspace

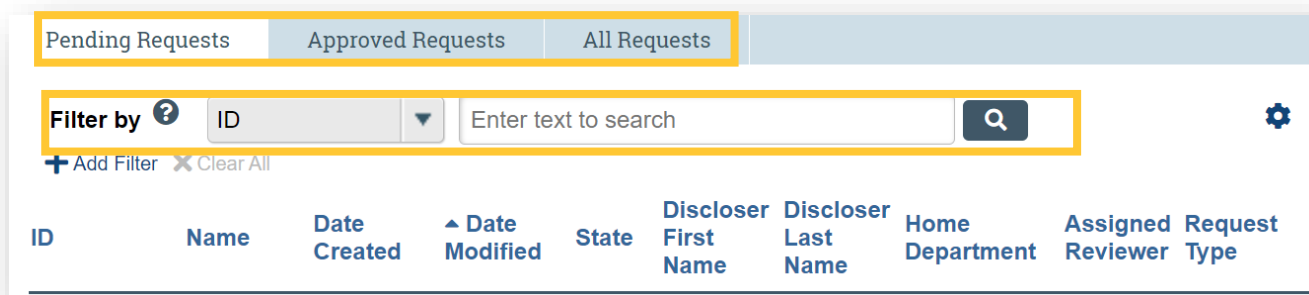
Refer to the guidance below on reviewing and submitting Pre-Approval Requests (PAR).

STEP 1: Review a PAR Request

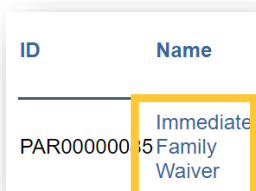
ARs will appear in your inbox Dashboard inbox. Refer to **Step 1** in the COI Disclosure Profile Workspace section above for additional guidance on how to filter your inbox. After logging into the [RAMP Portal](#), you should see the RAMP Dashboard. Select the **COI** tab from the menu, then select **Requests**.



Under the **Requests** tab, you can see all PARs. Use the tabs and the filter to narrow down your search results. Remember, the % symbol allows users to enter partial terms for a better search experience.

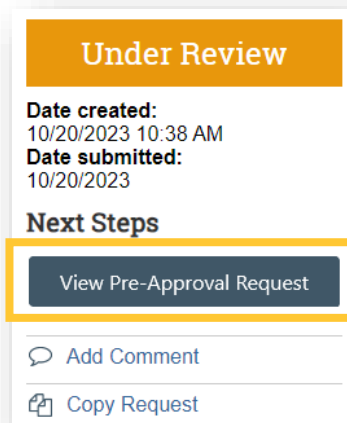


Select the **Name** of the PAR to enter the PAR workspace.



STEP 2: PAR Workspace

In the PAR Workspace, you are able to review all of the SmartForms associated with the PAR. Select **View Pre-Approval Request** under Next Steps. This opens the PAR and all associated SmartForms.



Under Review

Date created:
10/20/2023 10:38 AM

Date submitted:
10/20/2023

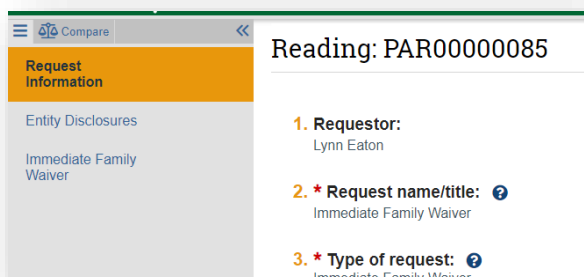
Next Steps

[View Pre-Approval Request](#)

[Add Comment](#)

[Copy Request](#)

Use the **SmartForm menu** to review the SmartForms associated with the PAR, depending on the request type.



Compare

Request Information

Entity Disclosures

Immediate Family Waiver

Reading: PAR00000085

1. Requestor:
Lynn Eaton

2. * Request name/title: [?](#)
Immediate Family Waiver

3. * Type of request: [?](#)
Immediate Family Waiver

Once you have completed your review, **Exit** to the SmartForm menu and return to the PAR Workspace.

STEP 3: Request Clarifications

In the PAR Workspace, you have the opportunity to request clarifications on the PAR request. When clarifications are needed, select **Request Clarifications** from the activity menu.

Under Review

Date created:
10/20/2023 10:38 AM

Date submitted:
10/20/2023

Next Steps

View Pre-Approval Request

☒ Submit My Review

↩
Request Clarifications

Assign Reviewer

Manage Ancillary Reviews

Add Comment

Add Private Comment

Once this activity is selected, you are able to leave comments and attach any supporting documents.

Request Clarifications

1. Comments:

2. Supporting documents:

+ Add

Name	Description
There are no items to display	

When requesting clarifications, notice the change in the workflow map in the PAR workspace.



In this new phase, the discloser is prompted with the option to **Edit Pre-Approval Request**, listed under Next Steps in the PAR Workspace, and is able to address clarifications and resubmit the request.

Once resubmitted, the PAR is back in the Review phase of the workflow. This process can be repeated until all required information is provided by the discloser to the reviewer.

STEP 4: Submit Review

If there are no further clarifications, you can submit your approval by selecting the **Submit Review** activity in the PAR Workspace.

Under Review

Date created:
10/20/2023 10:38 AM

Date submitted:
10/20/2023

Next Steps

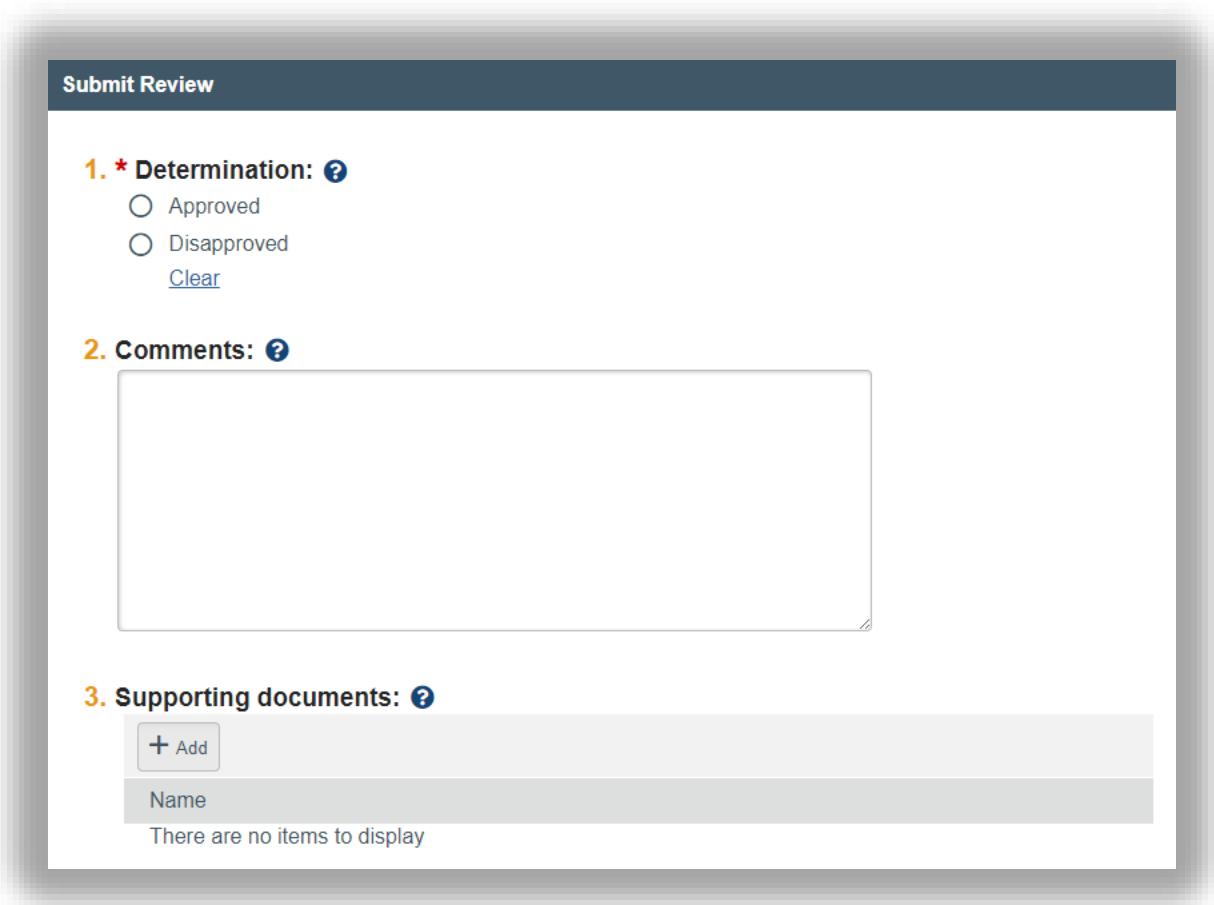
View Pre-Approval Request

☒ **Submit Review**

☐ Request Clarifications

☐ Return for Review

Once selected, you are prompted to select your determination of the request's approval or disapproval, and you are able to leave any comments or attach any supporting documents.



Submit Review

1. * **Determination:** ?

☐ Approved

☐ Disapproved

[Clear](#)

2. **Comments:** ?

3. **Supporting documents:** ?

[+ Add](#)

Name

There are no items to display

If the specified workflow includes additional reviewers, the PAR will move to those review phases, and reviewers will follow the same review process, with prior reviews listed as **Intermediate Review**. If there are no additional reviewers and the request is approved, the review is complete.

Once submitted and approved, the PAR will no longer show up in the COI tab under Pending Requests, but instead under **Approved Requests**.

Pending Requests

Approved Requests

All Requests

Filter by ?

ID

▼

Enter text to search

ID

Name

Date Created

▲ Date Modified State

STEP 5: Navigating the Workspace

In the PAR Workspace, you are able to see all recent activity for the PAR request. When a new workflow action is taken, it will appear under the **History** tab. You can use the dropdown menu and text field to filter activity.

